CareWhen Training

CareWhen Configuration

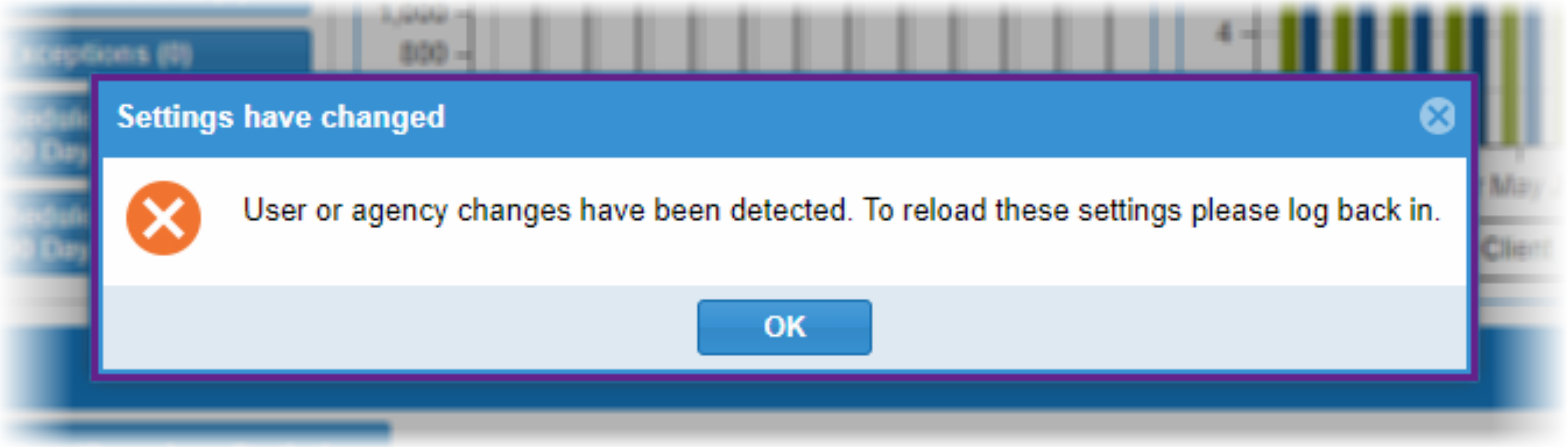
CareWhen Configuration

Before importing or adding clients and caregivers in CareWhen, selecting your settings and configuration preferences are crucial to the smooth operation of CareWhen for your business.

- **System Defaults**
- **Menu Dropdowns**
- **Communication Setup**
- **User Management**
- **Clockwork / EVV Setup**

CareWhen Configuration

Note: Making changes to Configuration settings that alter input fields found throughout the site will prompt a Logout after your changes have been saved. When the prompt appears, click OK to log out and log back in.



System Defaults

System defaults control how CareWhen operates to reflect your business operations

Identify Agency offices & zones

Set up schedule and holiday settings

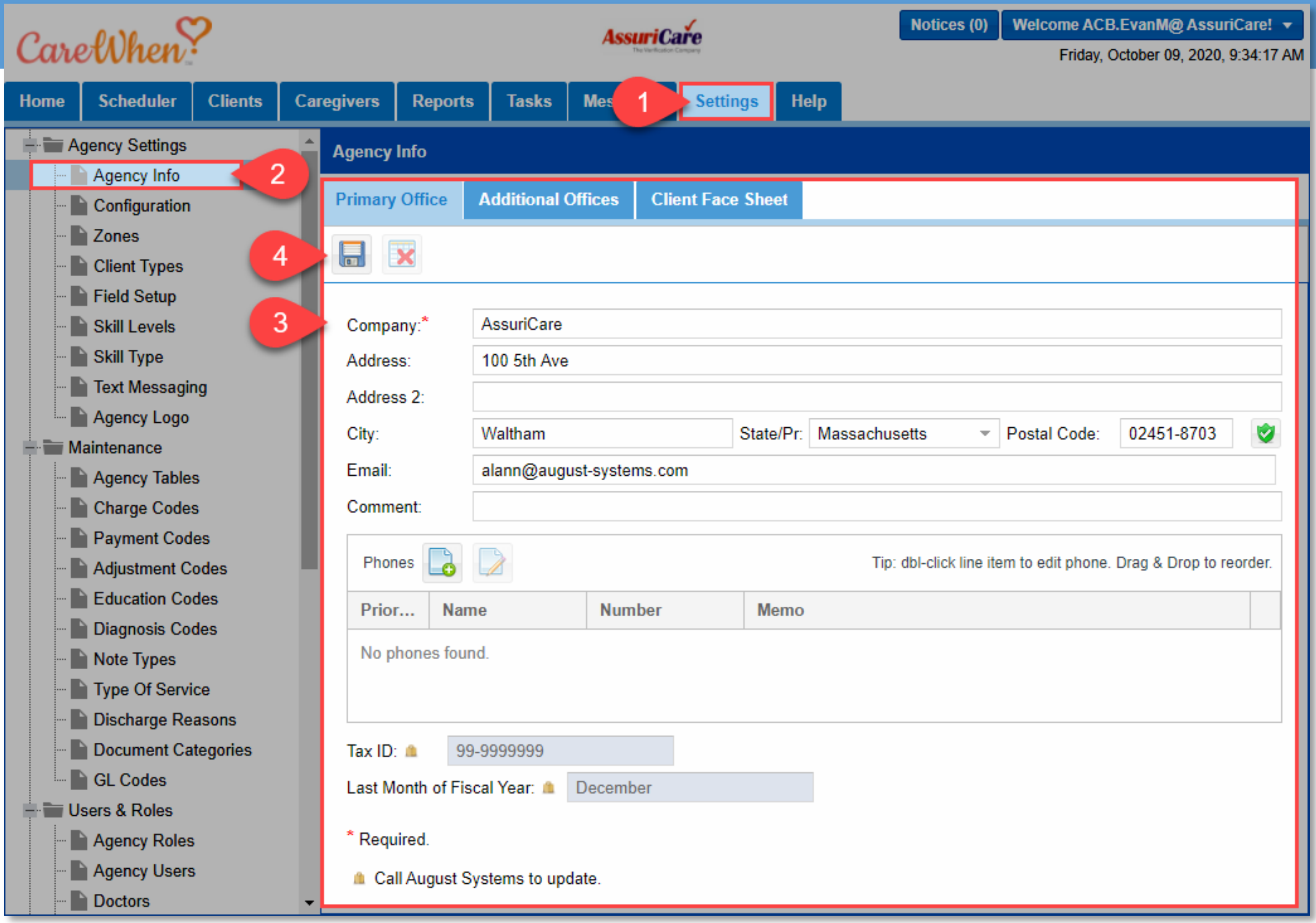
Configure overtime settings

Select fields to edit / show / hide

System Defaults

Primary & Additional Offices

Enter the Agency office information on the Primary Office tab under Agency Info. Additional office locations can be added on the Additional Offices tab.



Configuration Notes

- The email address entered will be used for customer service communications, as well as for billing information.
- The tax ID and last month of the fiscal year will be set up by AssuriCare

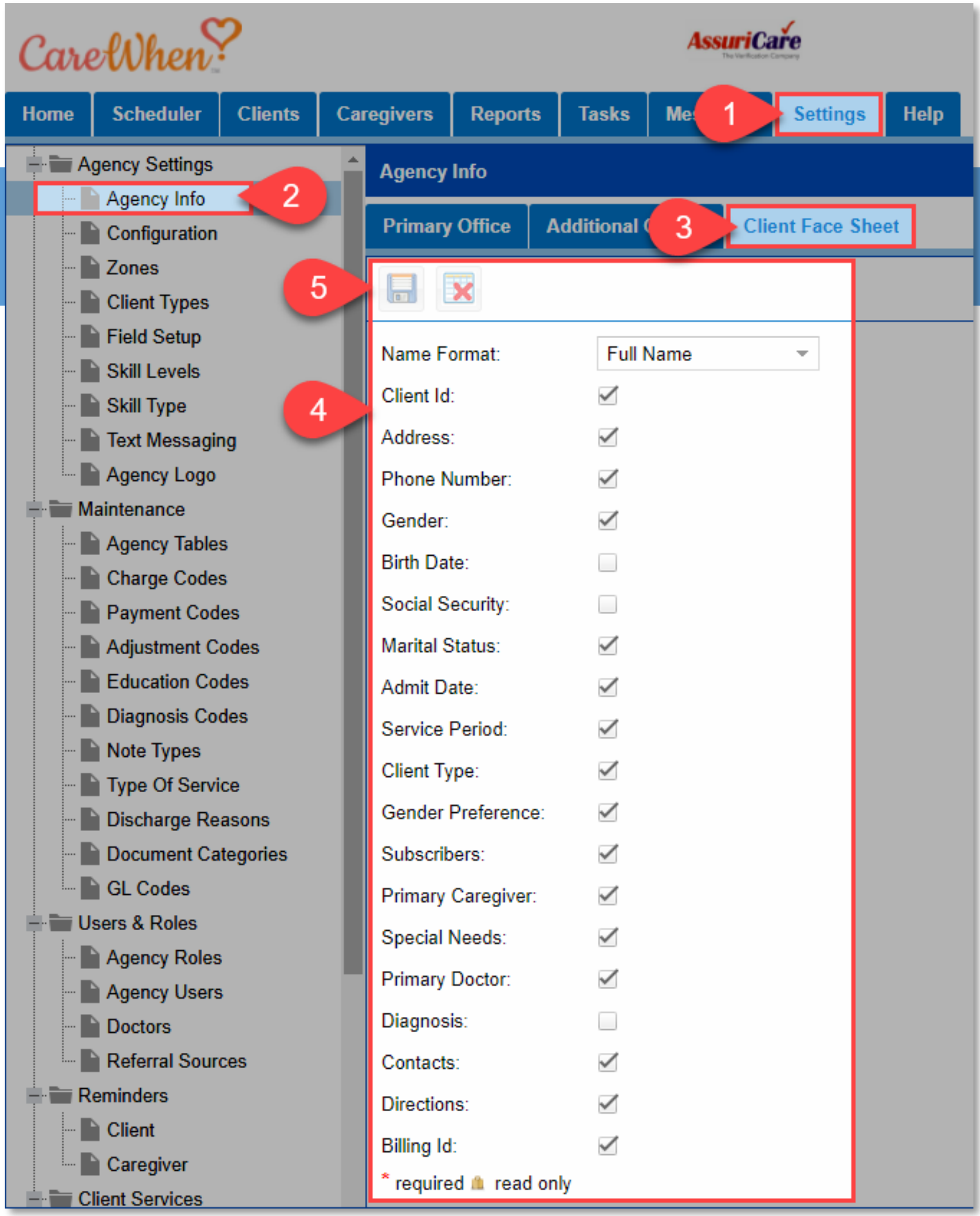
System Defaults

Client Face Sheet

The Client Face Sheet allows Agencies to design and customize an information sheet on an individual client to provide to Agency staff or caregivers.

Configuration Notes

- Check off the fields that you would like to be included on the Client Information Sheet and click the save button
- The Name Format dropdown allows you to pick how you would like the client name to show on the Client Face Sheet



AssuriCare

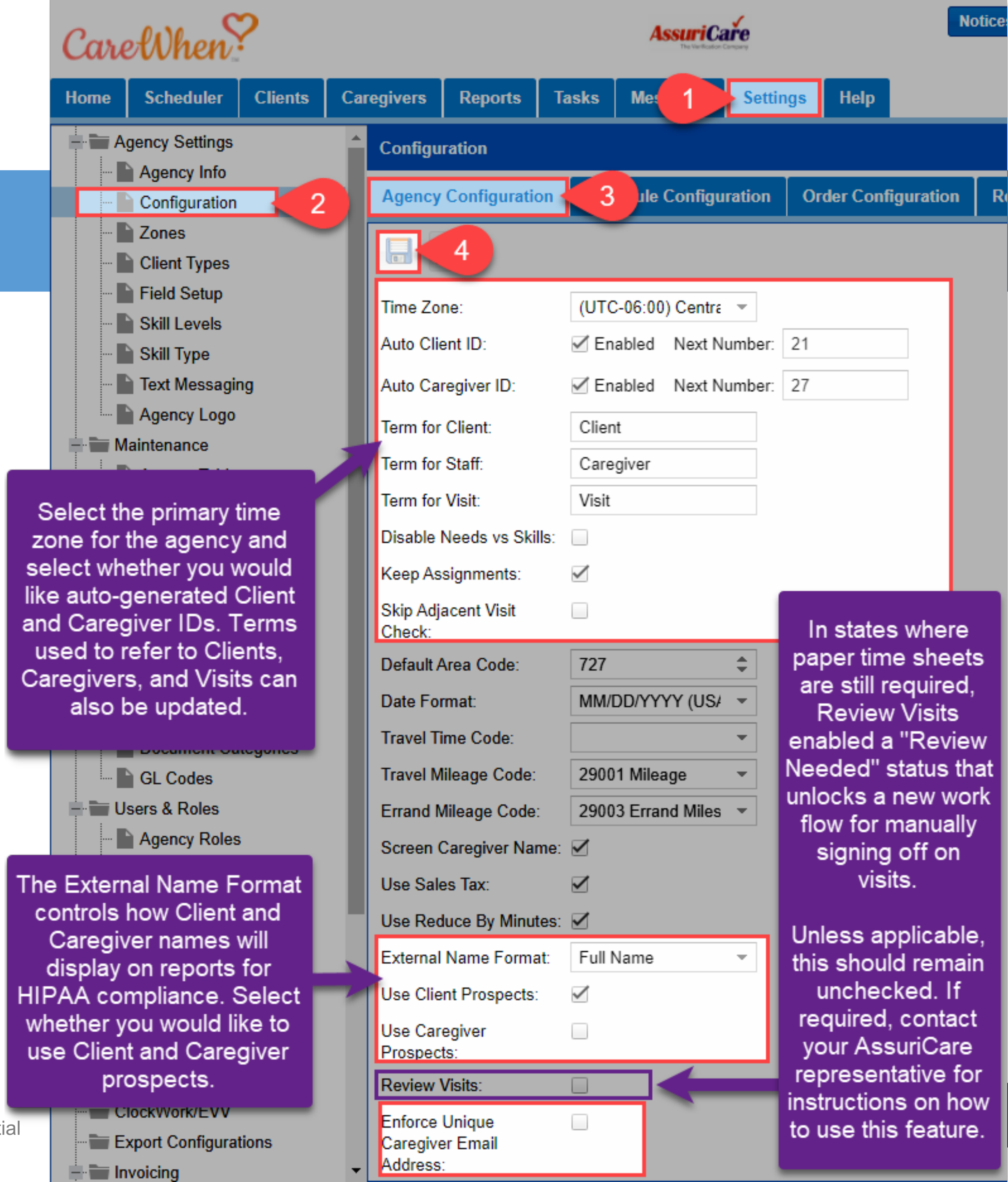
System Defaults

Agency Configuration

The Agency Configuration tab sets some of the most basic settings for your Agency.

Configuration Notes

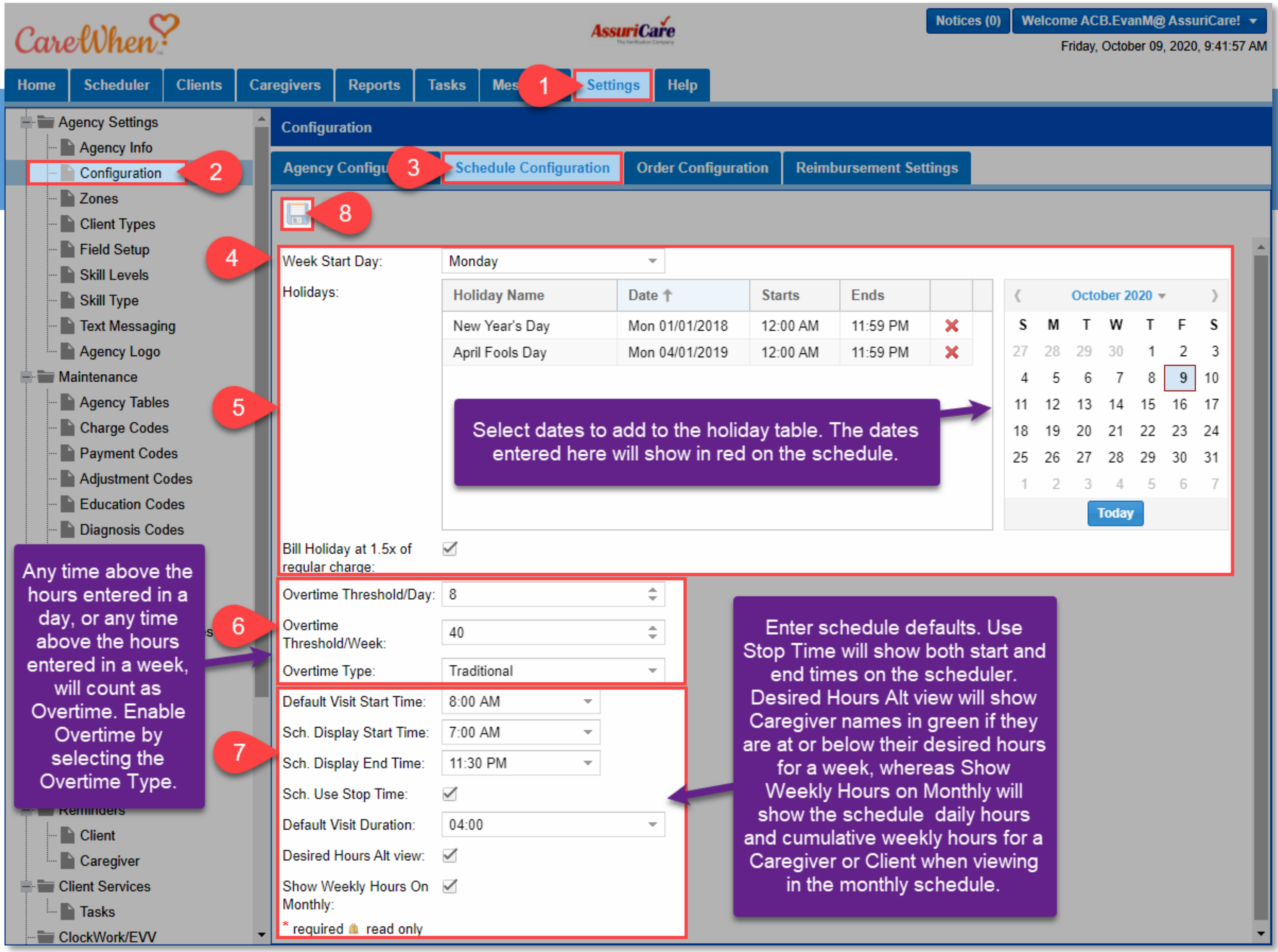
- *Disable Needs v. Skills* – when unchecked a warning generates if a caregiver does not have a skill that the client needs when assigning the visit
- *Keep Assignments* – when checked, visits scheduled during any entered unavailability for the caregiver show as a conflict
- *Skip Adjacent Visits* – when unchecked, the scheduler will receive a conflict alert for back to back visits for the caregiver
- *Enforce Unique Caregiver Email* – check your state Medicaid regulations if this should be enabled



System Defaults

Schedule Configuration

Schedule configuration is where you set the defaults for your schedule in CareWhen, including holidays, overtime, and display settings.



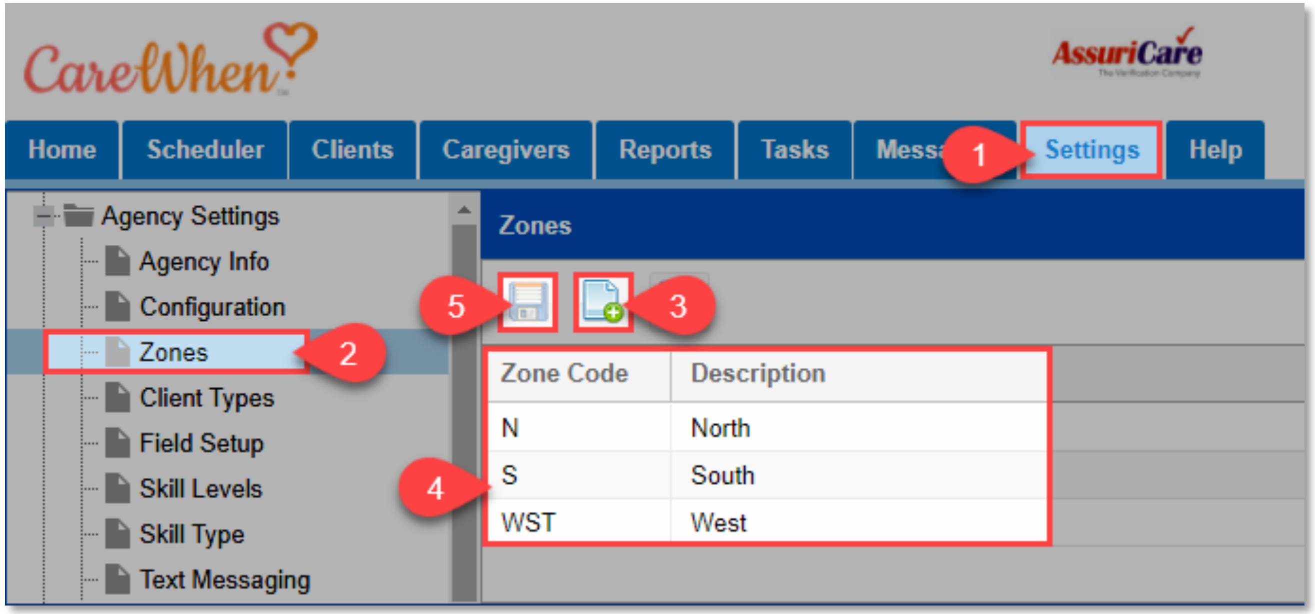
Configuration Notes

- Overtime Types contain three options:
  - Traditional OT is aggregated across *all* clients.
  - Agency OT is calculated on a client-by-client basis.
  - No OT disables Overtime in CareWhen.

System Defaults

Zones

Zones are defined by the Agency and are often either geographical areas or represent unique tax IDs if your Agency has multiple corporate entities. Clients are assigned to one zone, whereas caregivers are assigned to any zones that they will accept assignments within. This is used to help ensure schedulers do not assign a caregiver who is in not in the same zone as the client to the client's visit.



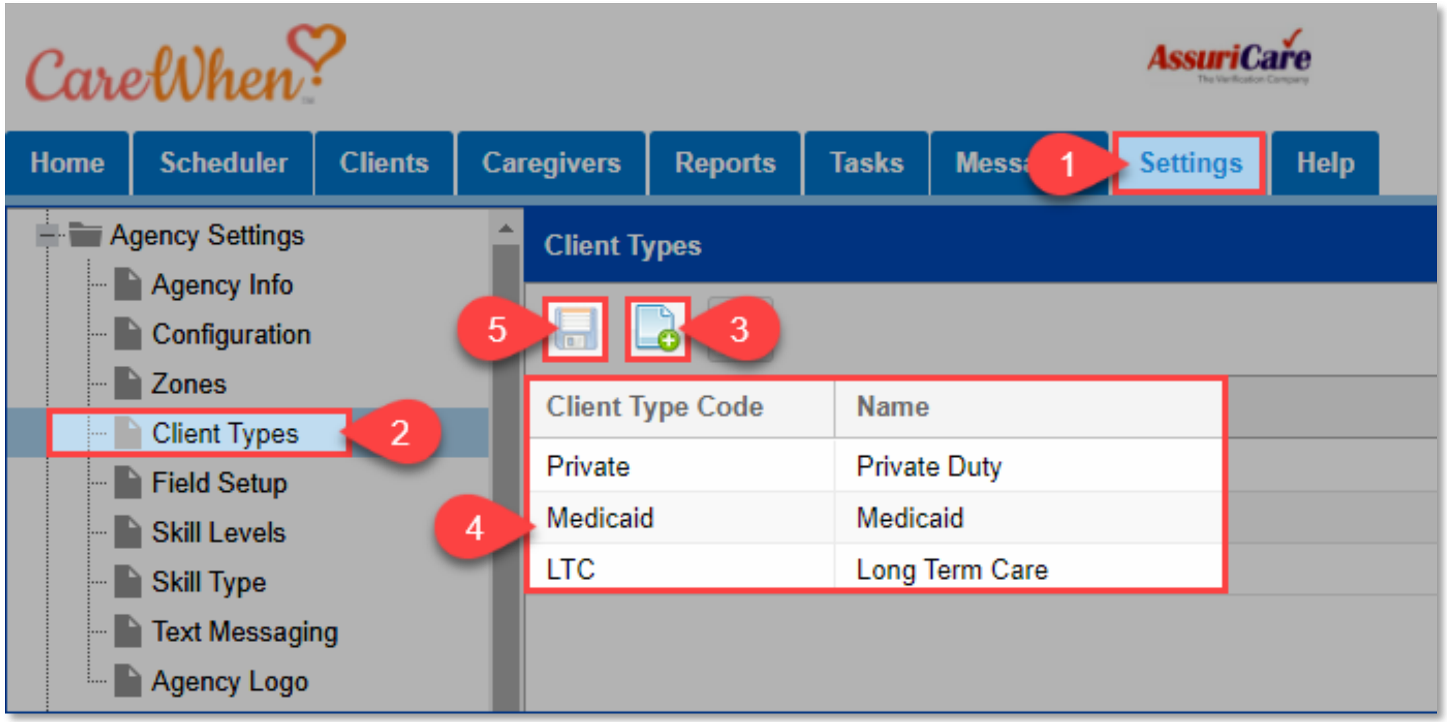
System Defaults

Client Types

Client Types are used to organize clients into certain groups that are used in Reporting.

Configuration Notes

- Client Types cannot be deleted after they have been used.
- Reports can be customized or filtered by client type.
- Common types include Private Duty, Medicaid, and LTCI.



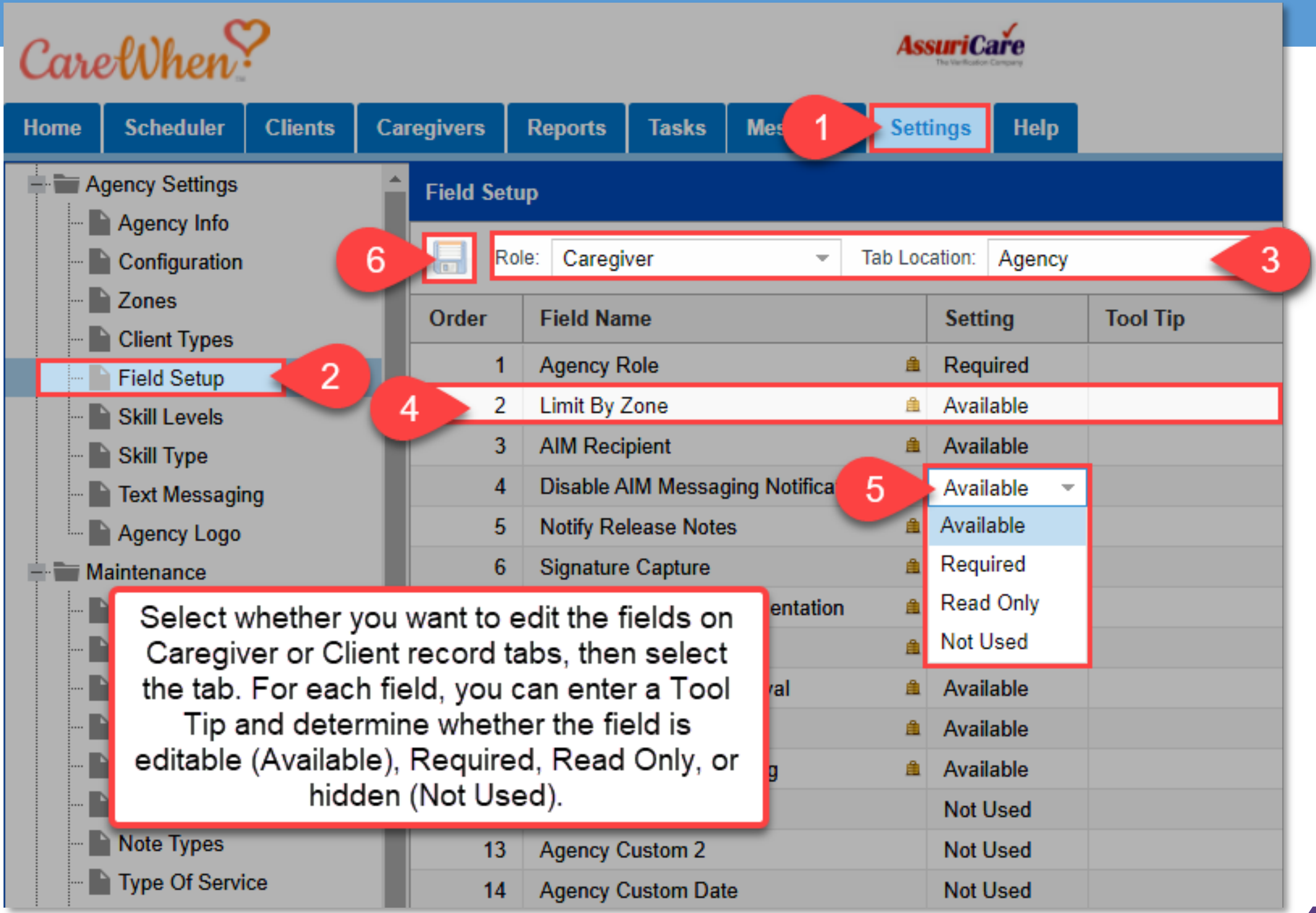
System Defaults

Field Setup

Field Setup allows you to determine which fields on certain Caregiver and Client record tabs you would like to be editable, required, read only, or hidden.

Configuration Notes

- Fields marked as not used will not show on the tab or in any reports.
- Tool Tips show as hover hints to remind the user when completing those fields about what the field is used for.
- When making changes, consult with AussiCare to ensure that no issues are caused from Field alterations.



AssuriCare

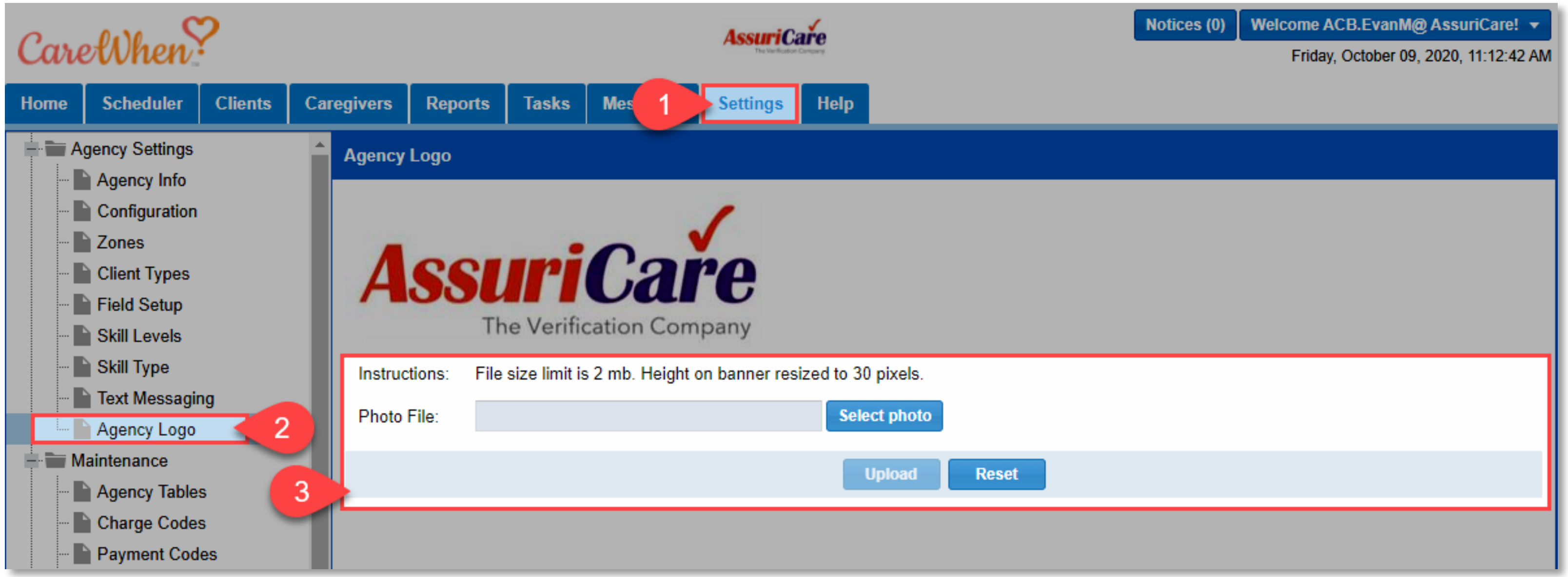
System Defaults

Agency Logo

If desired, you can upload your Agency's logo to display in CareWhen.

Configuration Notes

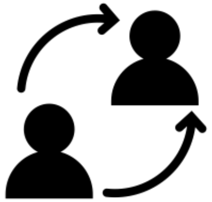
- To add a logo, click Select Photo and select your logo from your computer files. Click Upload to save the logo in CareWhen.
- Note that the format must be jpeg or png.
- This will show on any manually generated invoices as well.



Menu Dropdowns

You can customize the dropdown menus across the platform to reflect the common options that your business uses

Set user contact types



Manage referral source options

Curate cancellation and discharge options

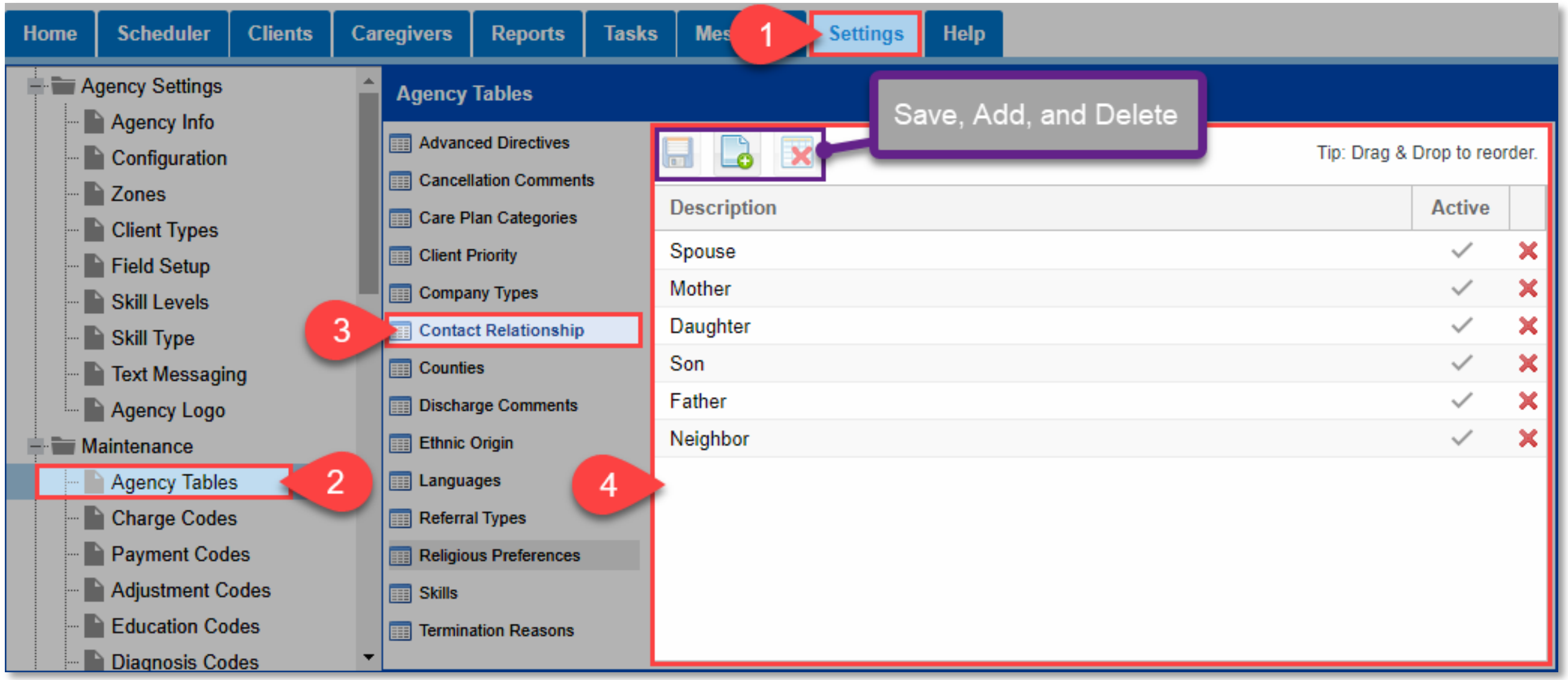
Menu Dropdowns

Agency Tables: Contact Relationship

Various kinds of contacts can be saved in a Client or Caregiver's "Contacts Tab"; the Contact Relationship tab in Maintenance Settings allows you to enter in contact types that are available on those tabs.

For Example…

- Contact Relationship types can include Spouse, Care Monitor, Mother / Father, Son / Daughter, etc.



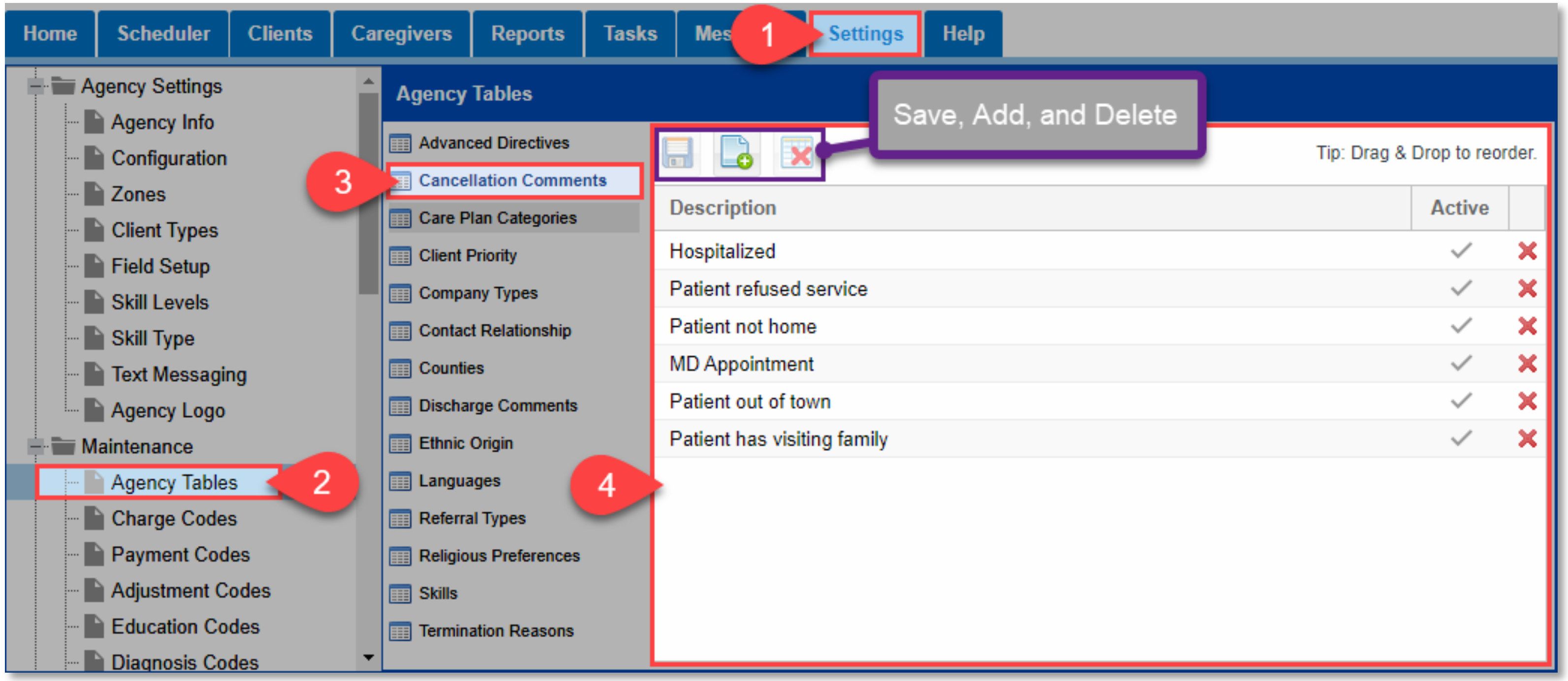
Menu Dropdowns

Agency Tables: Cancellation Comments

Cancellation comments are required whenever a visit is cancelled. The Cancellation Comments table allows Agencies to manage the available comments associated with visit cancellation.

Configuration Notes

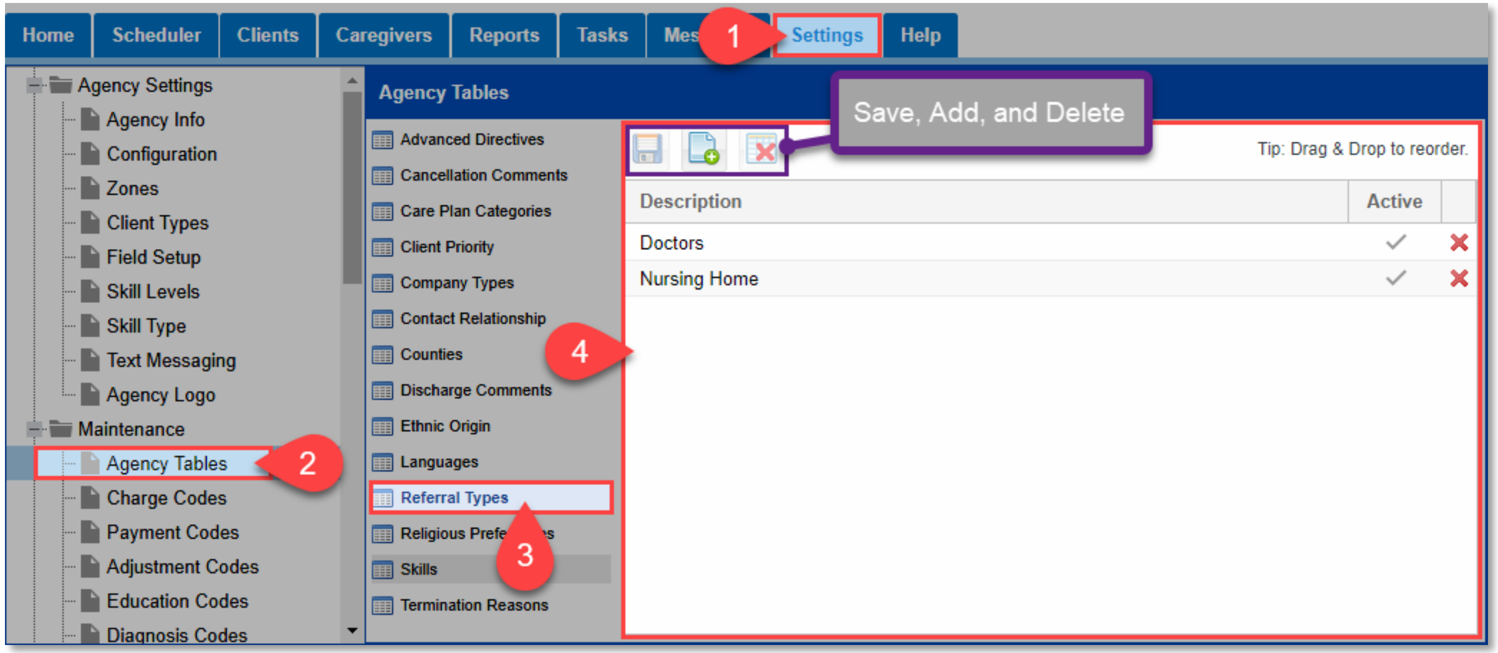
- Additional Cancellation Comments can be added from this table after setup.



Menu Dropdowns

Agency Tables: Referral Types

Agencies can track the type of referrals received through Referral Types, Company Types, and Referral Sources. Here you can add or edit current Referral Types.



Configuration Notes

- Referral types is the broadest category for tracking referrals. Examples could include "Internet" or “Community Living.“
- These can then be narrowed further by company type which might be "Internet -> Social Media" or “Community Living -> Assisted Living Facility”
- At the lowest level is the referral source, which might be "Internet -> Social Media -> Facebook" or “Community Living -> Assisted Living Facility -> Shady Pines.”

AssuriCare

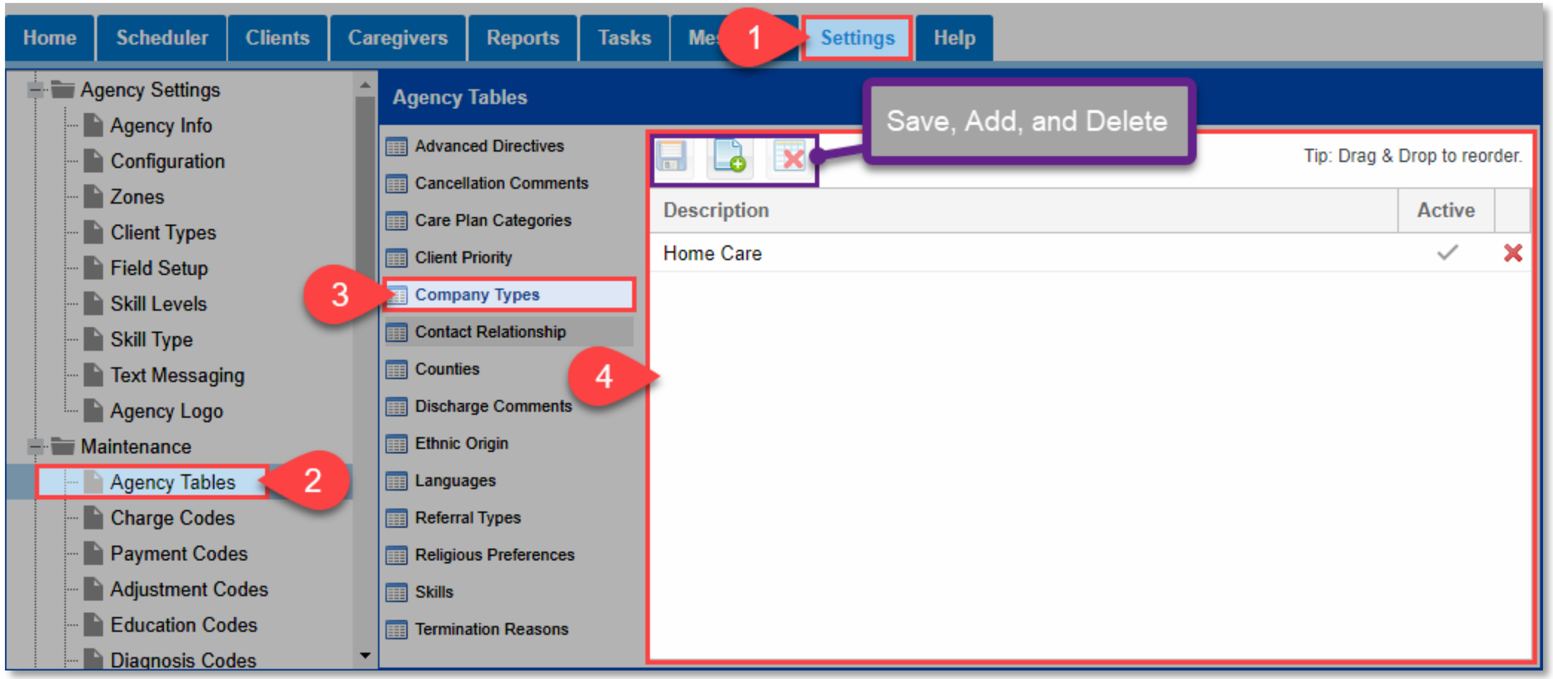
Menu Dropdowns

Agency Tables: Company Types

Set the company-type designation options available when entering referral sources. These serve as a further narrowing down of the Referral Types category.

For Example…

- Company Types can include hospitals, assisted living facilities, social media, or radio stations.



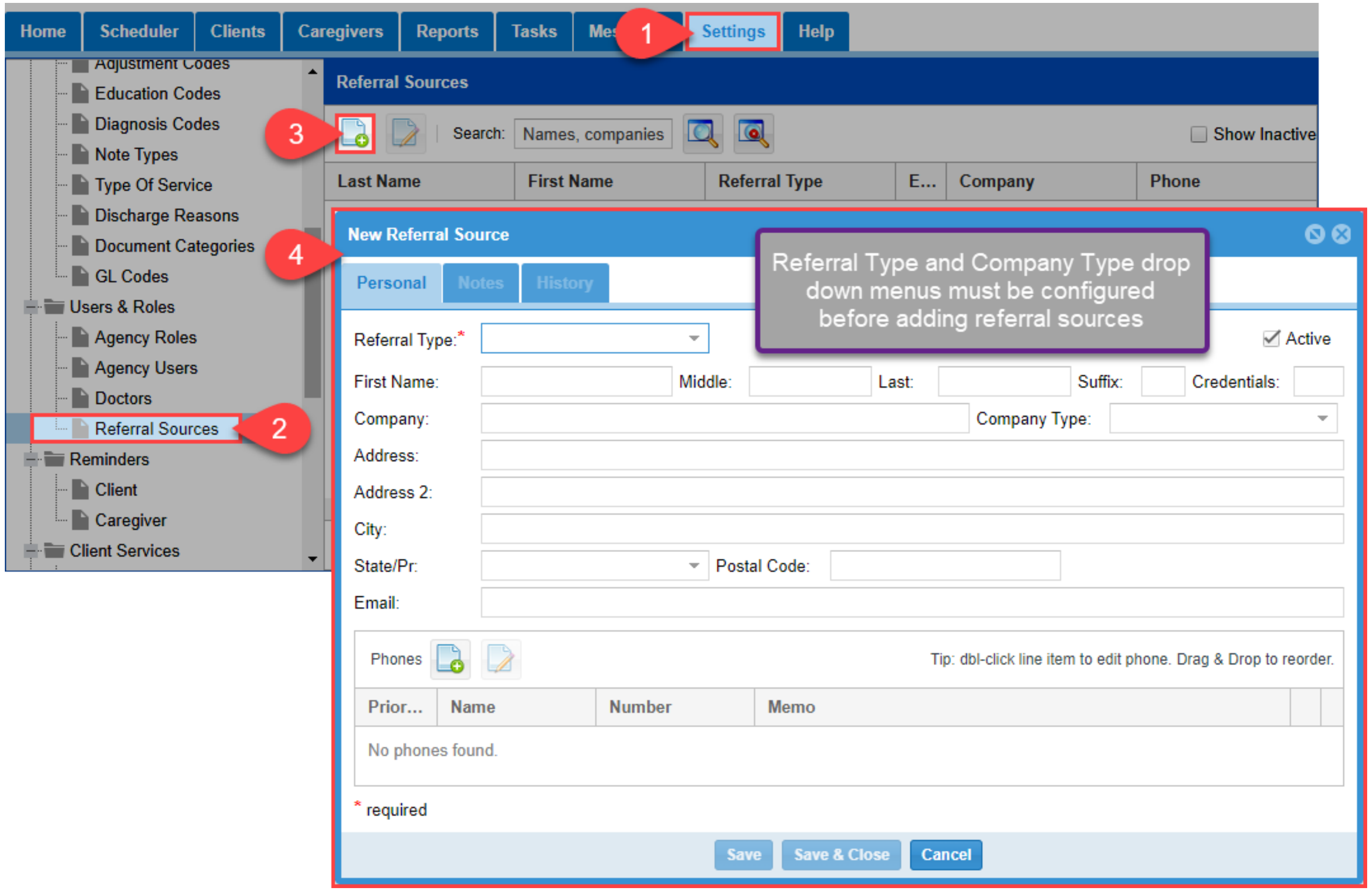
Menu Dropdowns

Referral Sources

You can create a list of referral sources to track how clients or caregivers come to your Agency. The referral source will show on the client and caregiver records to tag each as to how they were referred (if applicable).

Configuration Notes

- Both Company Types and Referral Types need to be defined in the Agency Tables before adding a Referral Source
- An example of a referral source could be Sally Smith, a former caregiver.



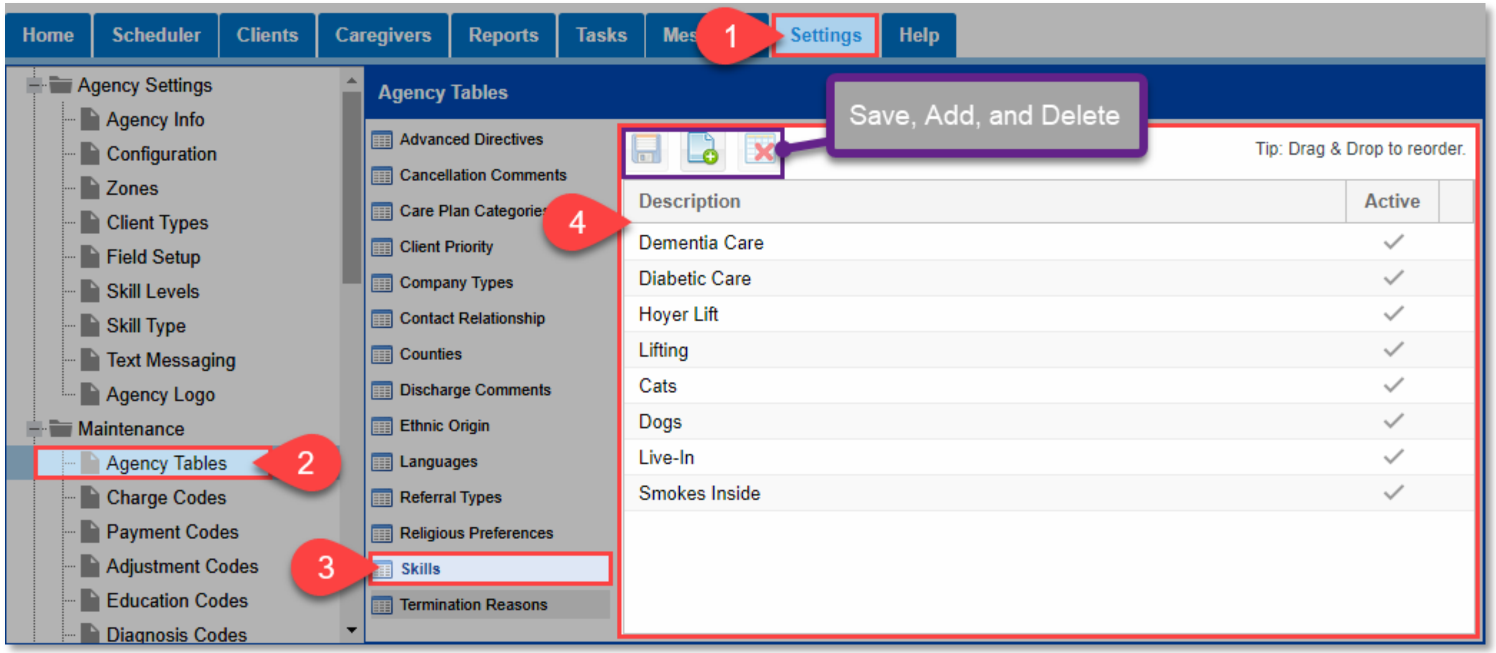
Menu Dropdowns

Agency Tables: Skills

Use the Skills tab to manage a list of various “skills” available to add on a Caregiver’s record. These skills will also show as “Needs” on a Client’s record. When checked on a Caregiver record, it indicates that the Caregiver can perform that skill. When checked on a Client’s record, it indicates that the Client needs someone who can perform that skill.

Configuration Notes

- If “Disable Skills v. Needs” is checked in the Agency Settings area, there will be no limitations on assigning Caregivers to Clients based on matching skills.



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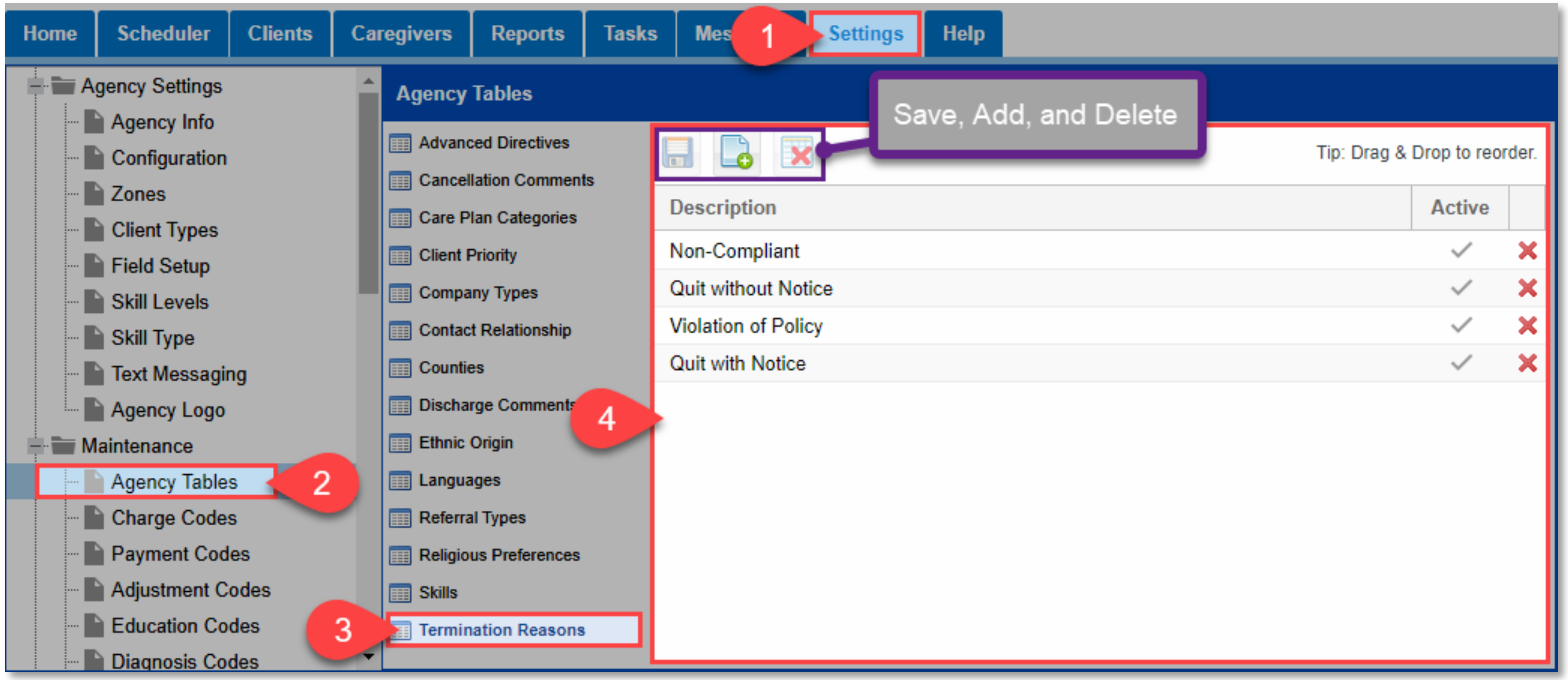
Menu Dropdowns

Agency Tables: Termination Reasons

When removing a Caregiver from an Agency, the option will be available to leave a Termination Reason. Use the Termination Reason table to curate a list of selectable reasons.

For Example…

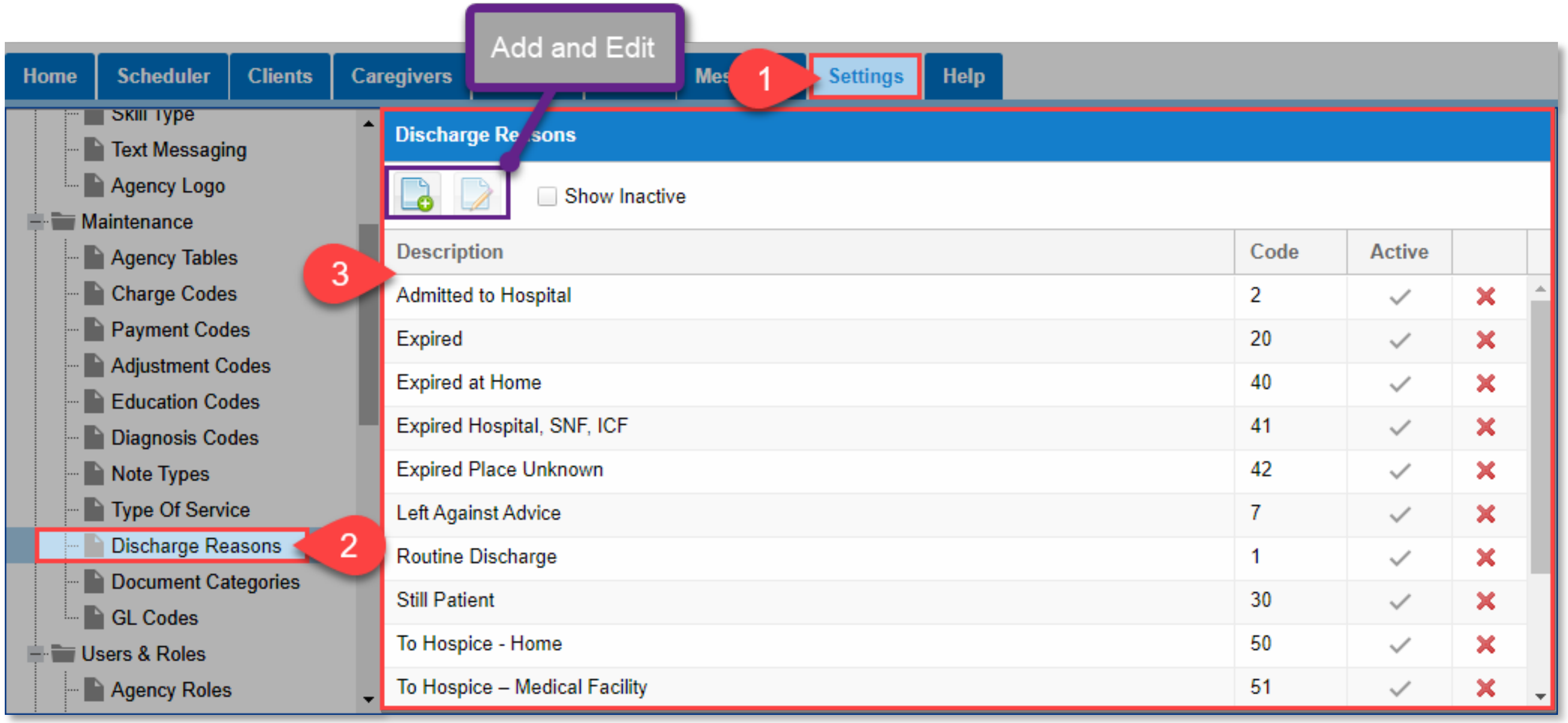
- Some examples of removal reasons include:
  - Non-Compliant
  - Quit without Notice
  - Violation of Policy
  - Quit with Notice



Menu Dropdowns

Discharge Reasons

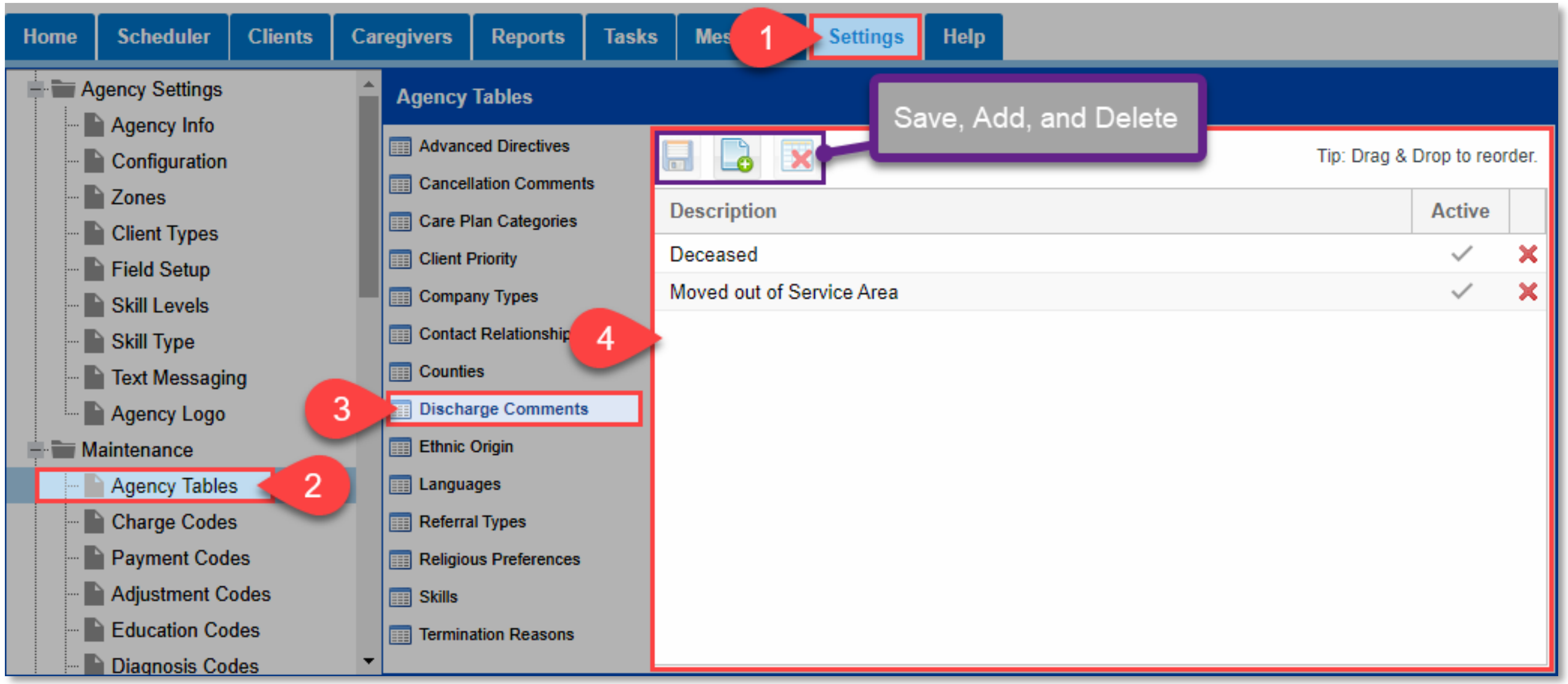
The Discharge Reasons table contains approved discharge reasons that are used when a Client is *ending* service. Reasons can be added, edited, or deleted here.



Menu Dropdowns

Agency Tables: Discharge Comments

Discharge comments are required whenever a Client is discharged. The Discharge Comments table allows Agencies to manage the available comments associated with Client discharge.



Configuration Notes

- Additional Discharge Comments can be added from this table after setup.

Menu Dropdowns

Optional Tables

In addition to the primary tables we recommend, you can customize these optional tables to provide drop downs for additional information on the Client and Caregiver records

Add Personal and Private information options

Set Client Disaster Priority

Manage Client Diagnosis Codes

Add language, religious preference, and ethnicity options

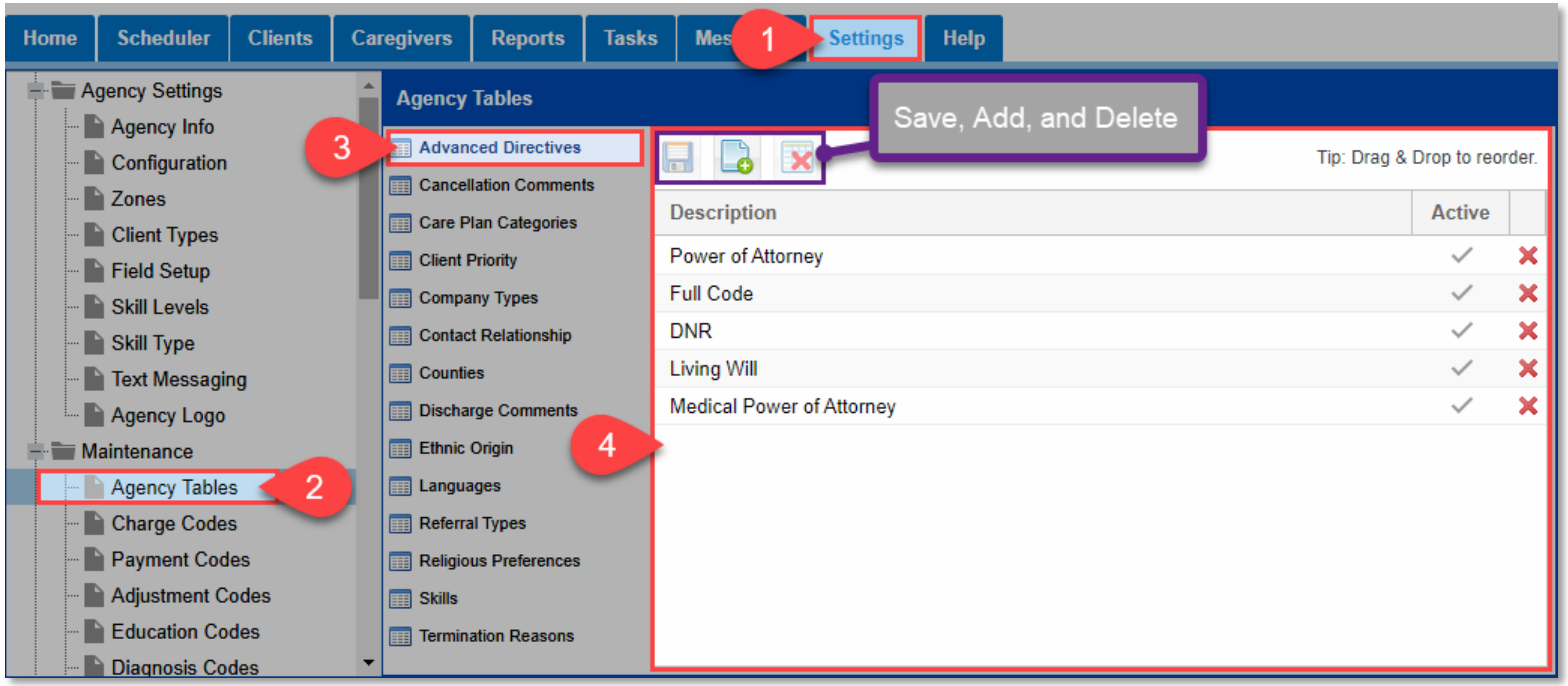
Menu Dropdowns (Optional)

Agency Tables: Advanced Directives

Items entered in the Advanced Directives table will be used from a Client's "Private" Tab to help designate preferred care. Items entered here also appear on the Client Record page.

For Example…

- Types of Advanced Directives could include:
  - POA
  - DNR
  - HealthCare Surrogate



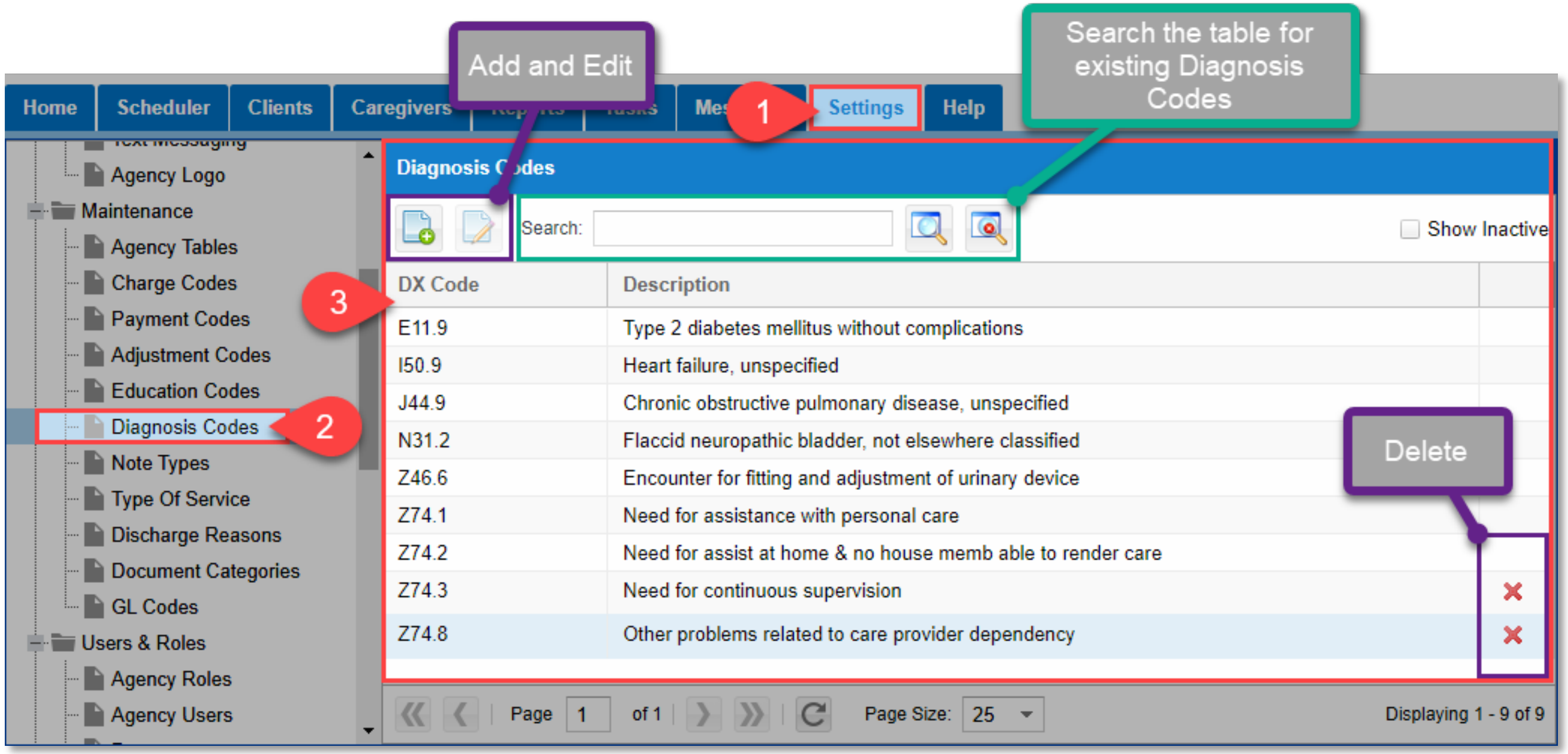
Menu Dropdowns (Optional)

Diagnosis Codes

Agencies can search ICD codes, published by CMS, and add them to the Diagnosis Codes table. The contents of this table are used in the dropdown list found on the Client record.

Configuration Notes

- The diagnosis description can be modified if desired.
- If preferred, an Agency may enter diagnosis free-form text description.



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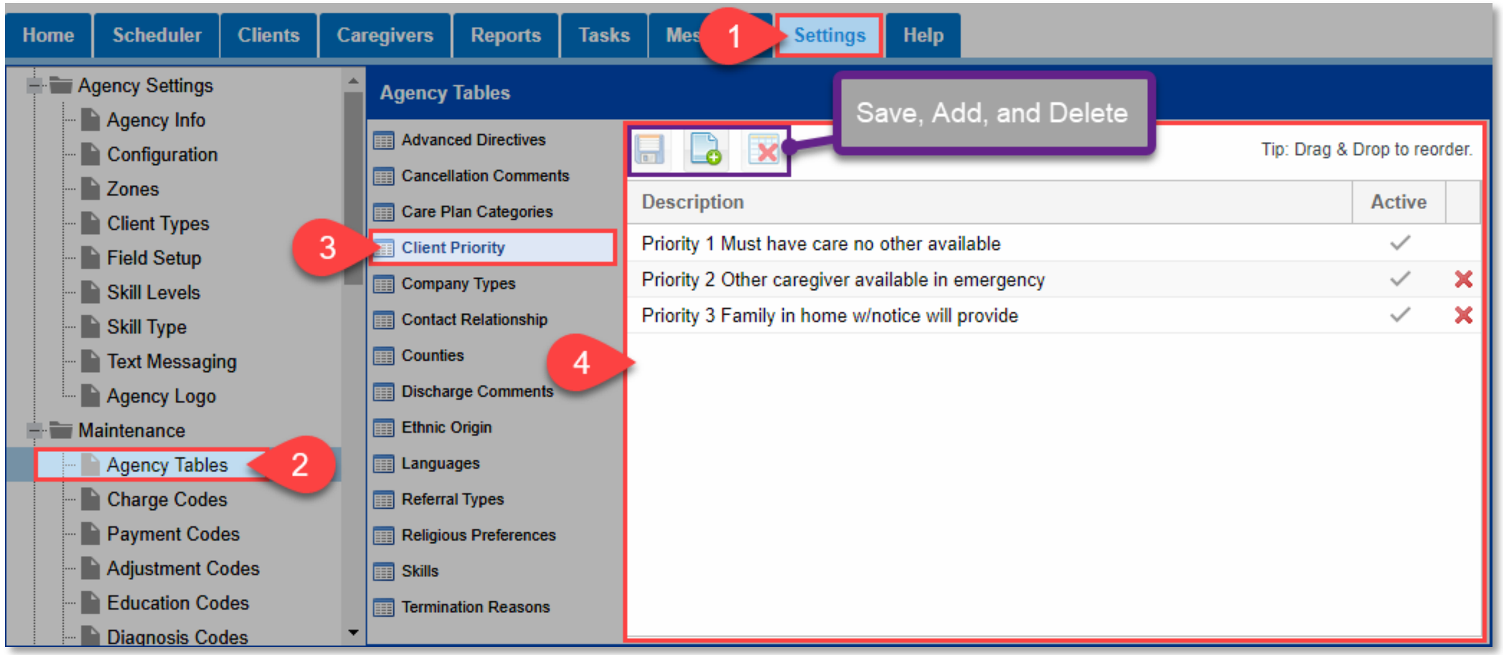
Menu Dropdowns (Optional)

Agency Tables: Client Priority

The Client Priority table is used by Agencies to classify disaster priority for Clients, as is required in some states. This is intended to prioritize those who need care the most.

Configuration Notes

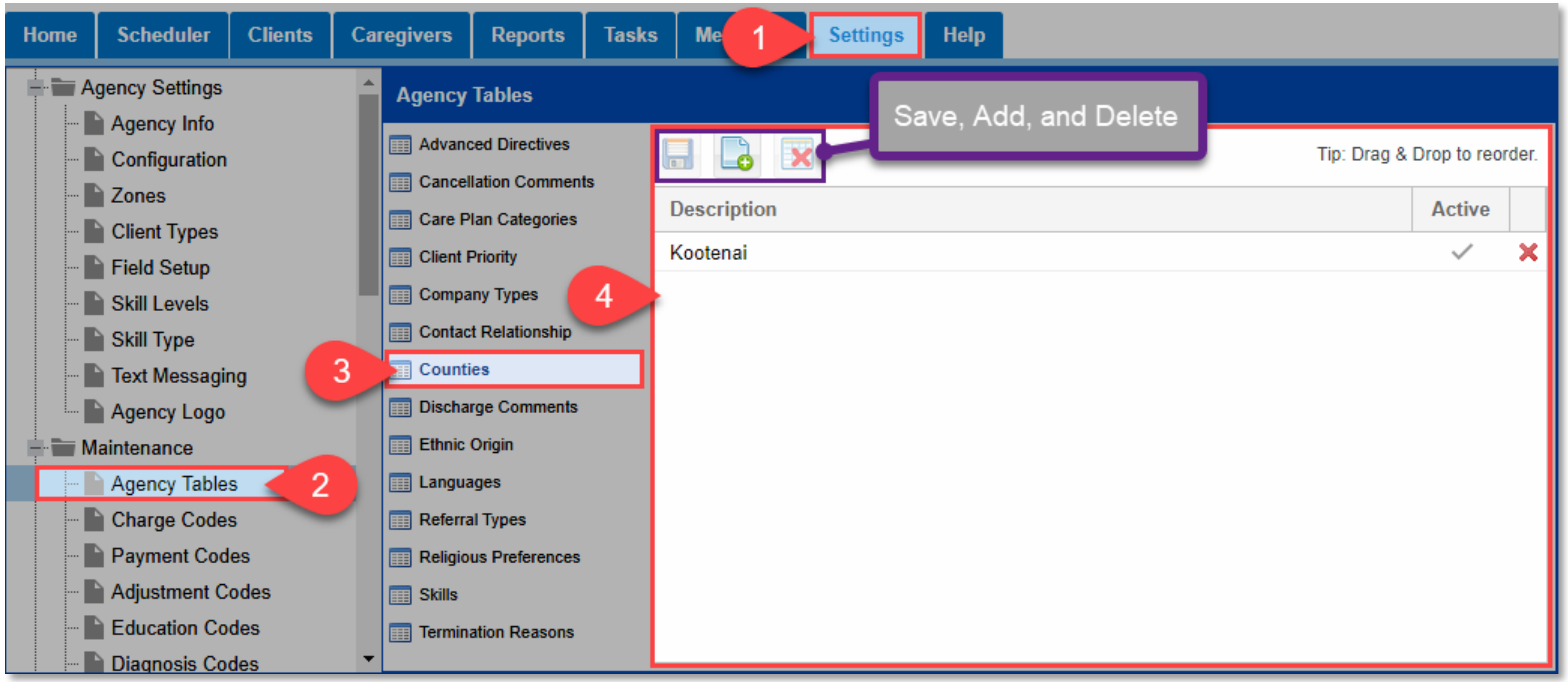
- If an Agency had a Caregiver shortage due to a natural disaster, this would inform them which clients cannot go without help.



Menu Dropdowns (Optional)

Agency Tables: Counties

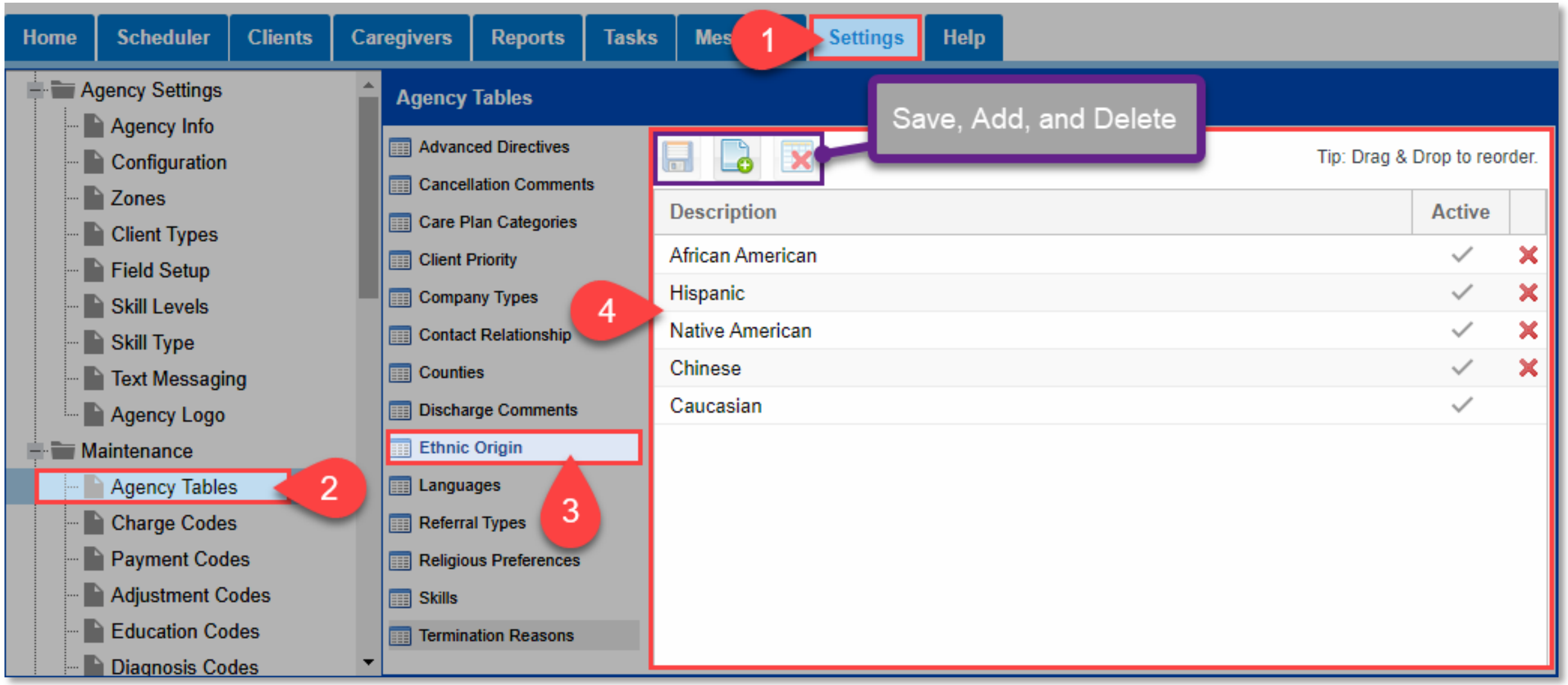
The Counties table allows you to set options available to use under a Client's "Personal Tab" when setting up or editing their information.



Menu Dropdowns (Optional)

Agency Tables: Ethnic Origin

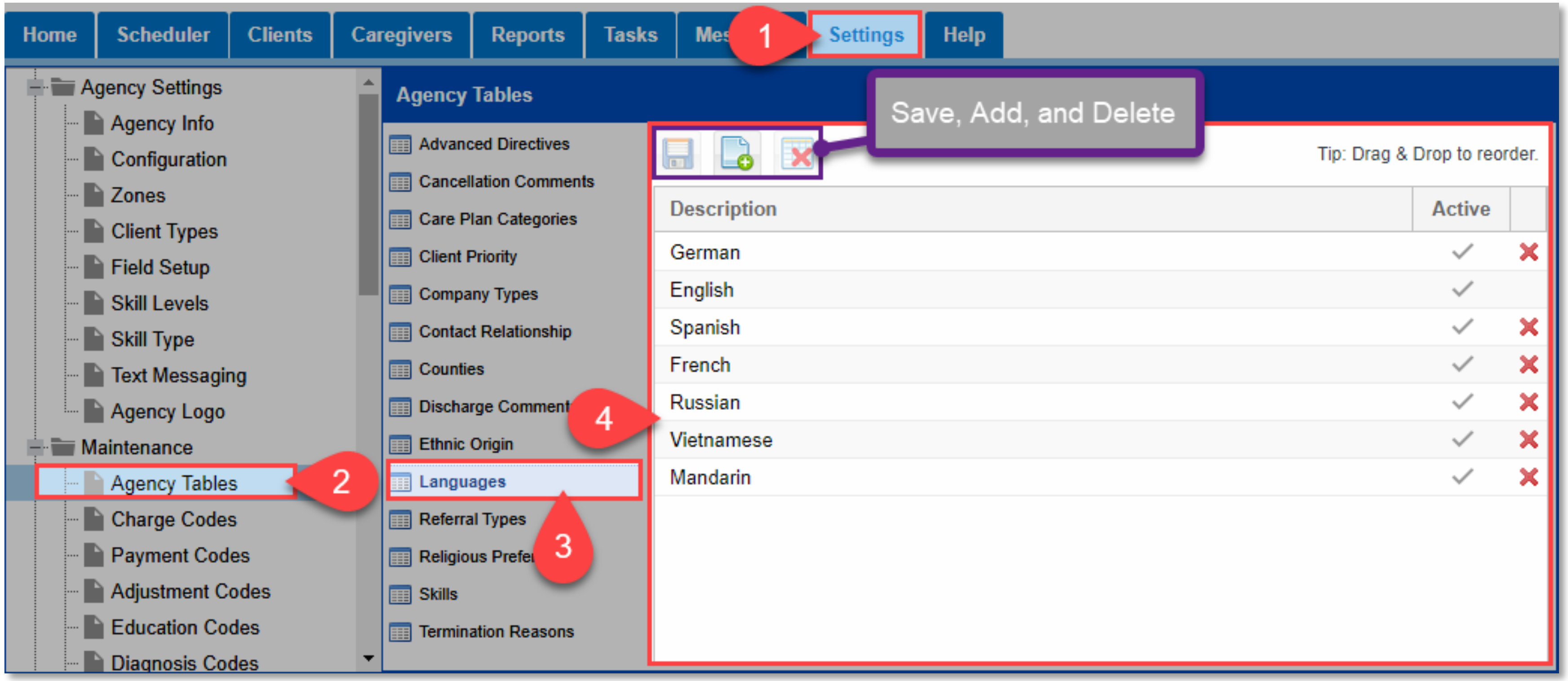
Use the Ethnic Origin tab to curate a list of available ethnicities to add to a Client or Caregiver's record.



Menu Dropdowns (Optional)

Agency Tables: Languages

Use the Languages tab to curate a list of available languages to add to a Client or Caregiver's record.

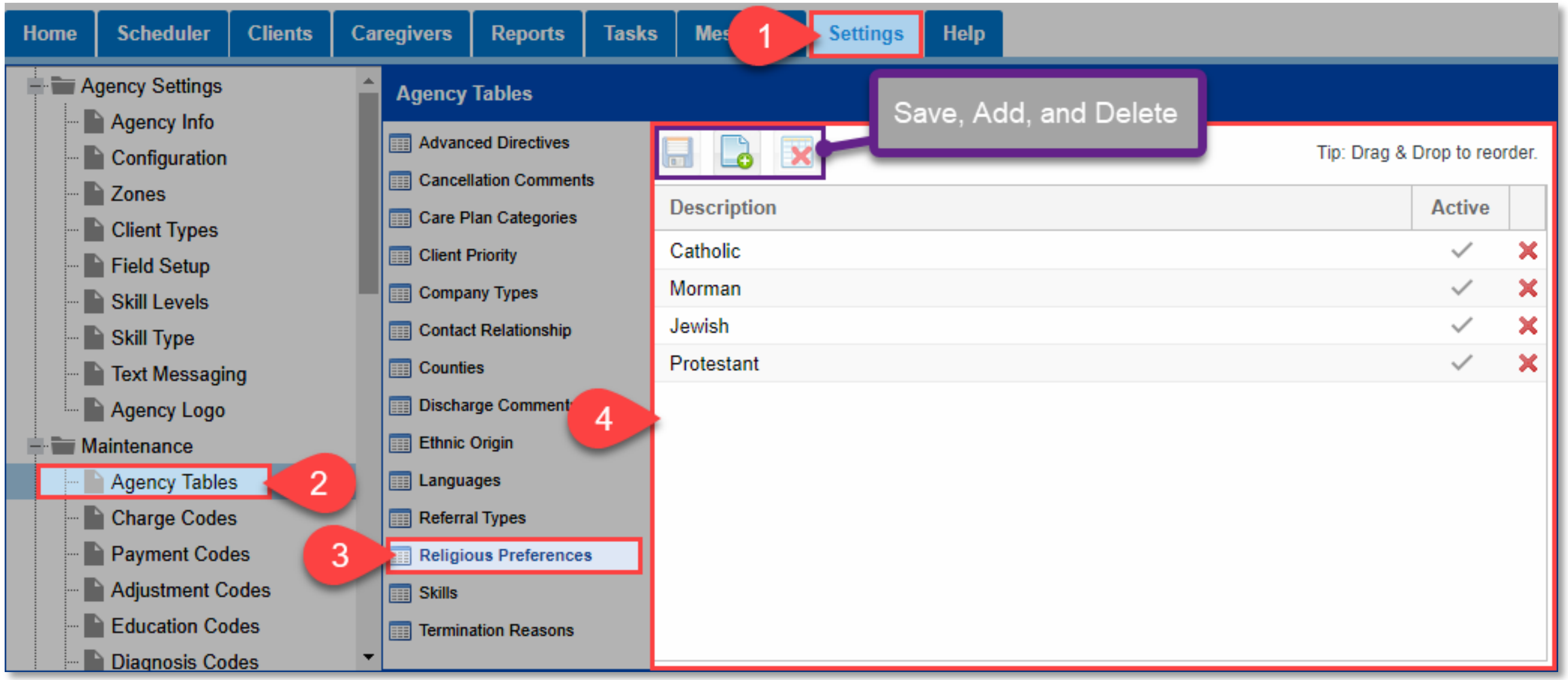


AssuriCare

Menu Dropdowns (Optional)

Agency Tables: Religious Preferences

Use the Religious Preferences tab to curate a list of available religions to add to a Clients record.



Communication Setup

Communication Setup controls how CareWhen communicates to clients, caregivers, and AssuriCare will operate

Create reminders for client tasks & caregiver tasks

Design document categories

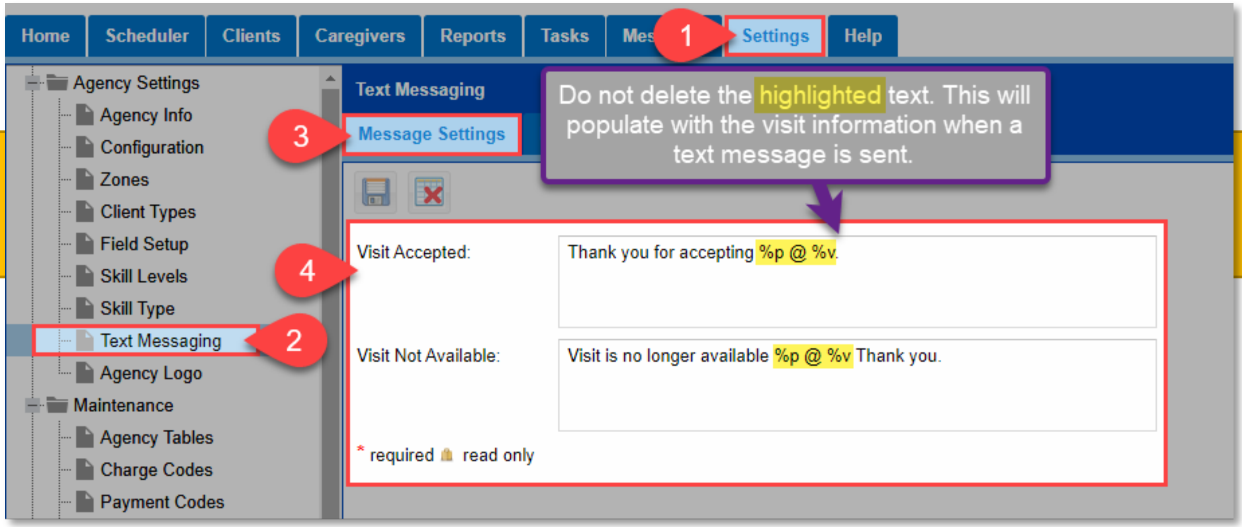
Configure note types

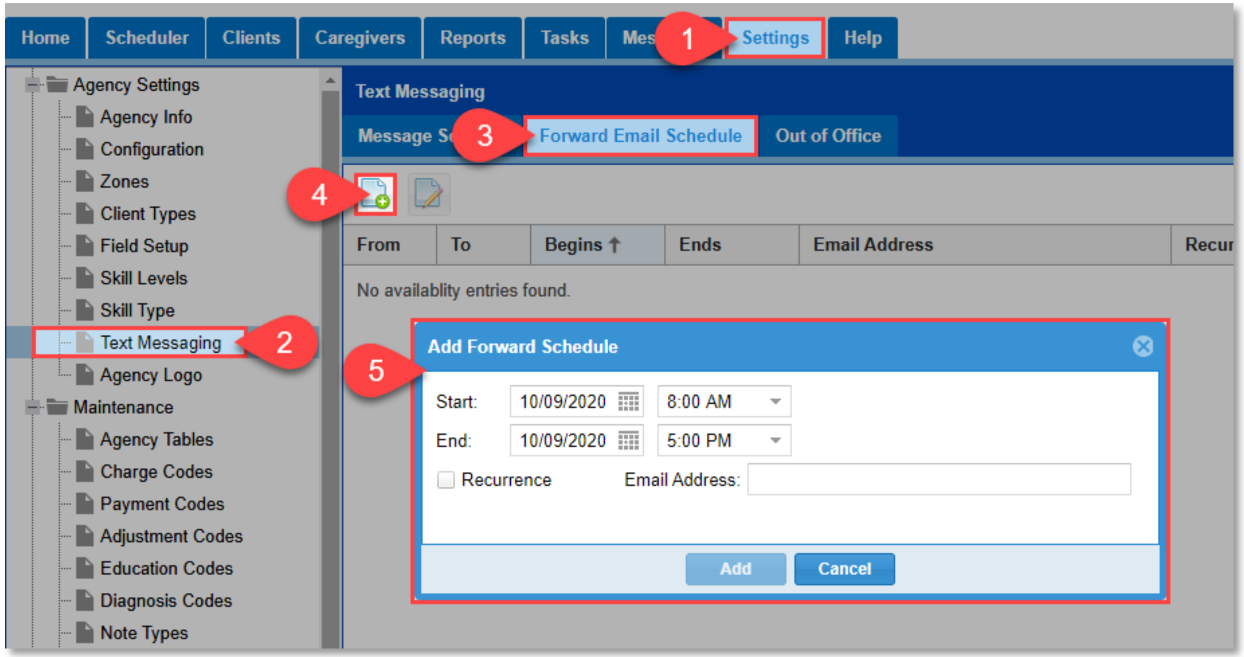
Build default text messages for available visits

Communication Setup

Text Messaging

With CareWhen you can send text messages to caregivers to offer them visits. You can customize the text message language, as well as set forwarding schedules for replies to those messages to go to a specific Agency staff member by email. This page is also used to set Out of Office text responses that are sent to Caregivers attempting to communicate with an Agency after hours.





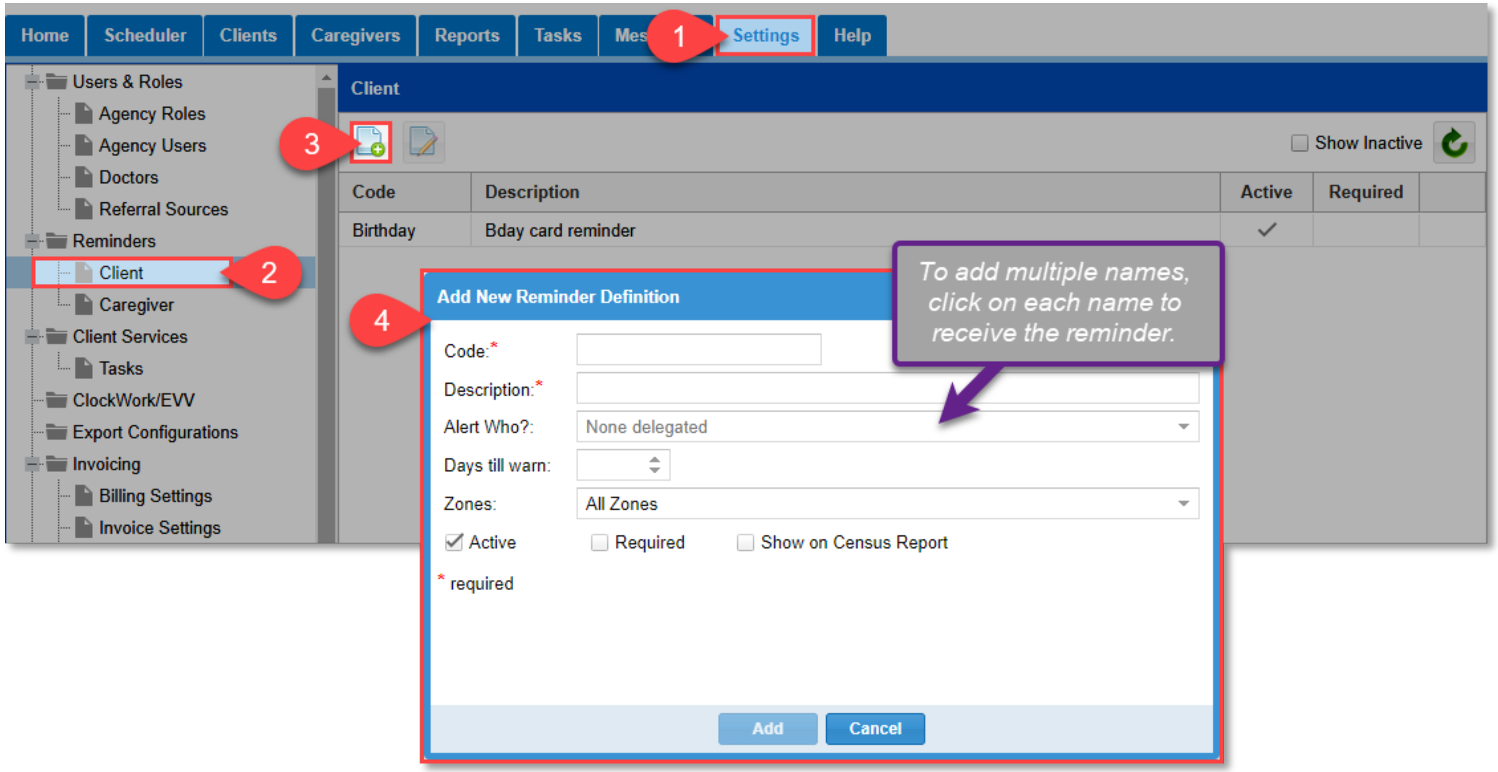
Configuration Notes

- The text message language saved here will become the default message, but when you send out individual messages you will have the option to change it for that individual.

Communication Setup

Client Reminders

Reminders can be created to follow up with clients for various reasons, such as a new prospect follow up, client birthday, or home visit.



Configuration Notes

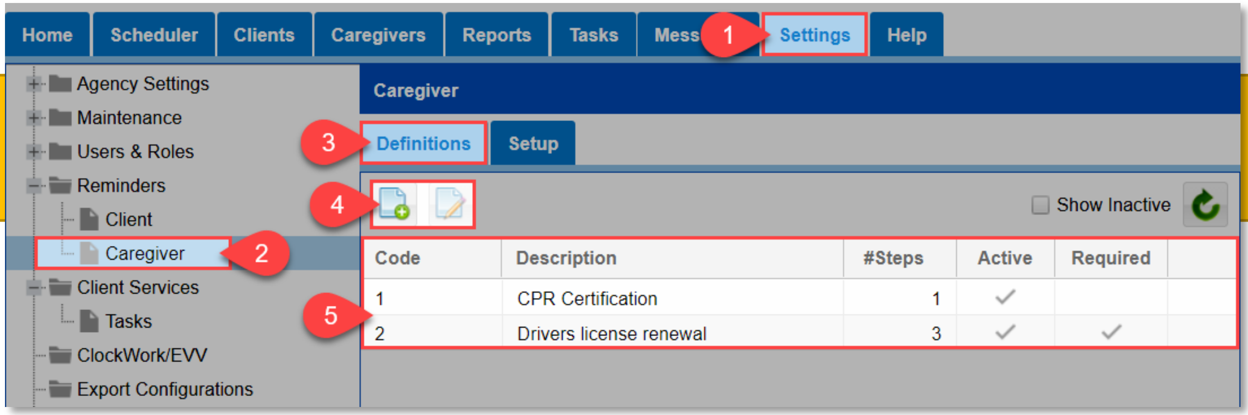
- Reminders are added on the Reminders tab of the Client record and managed from the Quick Summaries area of the Scheduling tab
- Required reminders will automatically be created when entering in a new client
- Only users added to the "Alert Who?" field will receive the reminder

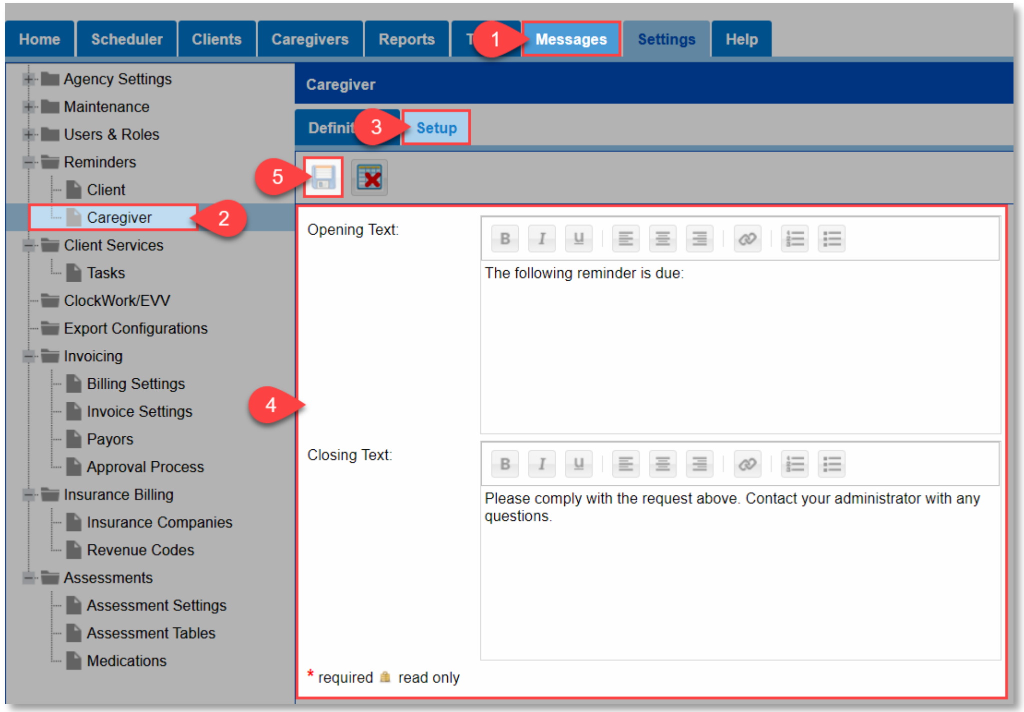
AssuriCare

Communication Setup

Caregiver Reminders

Reminders are also available for caregivers. Often reminders are used to remind caregivers about the renewal of certifications.





Configuration Notes

- Reminders are added on the Reminders tab of the Caregiver record and managed from the Quick Summaries area on the Scheduler tab
- Required reminders will automatically be created when entering in a new client
- Caregiver reminders can be set up with multiple steps. Steps refer to the number of reminders. For example, you could set up step one to send a 60-day reminder and step 2 to be a 30-day reminder.
- On the Setup tab, you can specify how the reminder will start and end.

Communication Setup

Creating a Caregiver Reminder

Sample reminder

Dear Annie,

The following reminder is due:

Due Date	Reminder
04/29/2020	

Your CNA license is due for renewal. Please send the office an updated copy of your license.

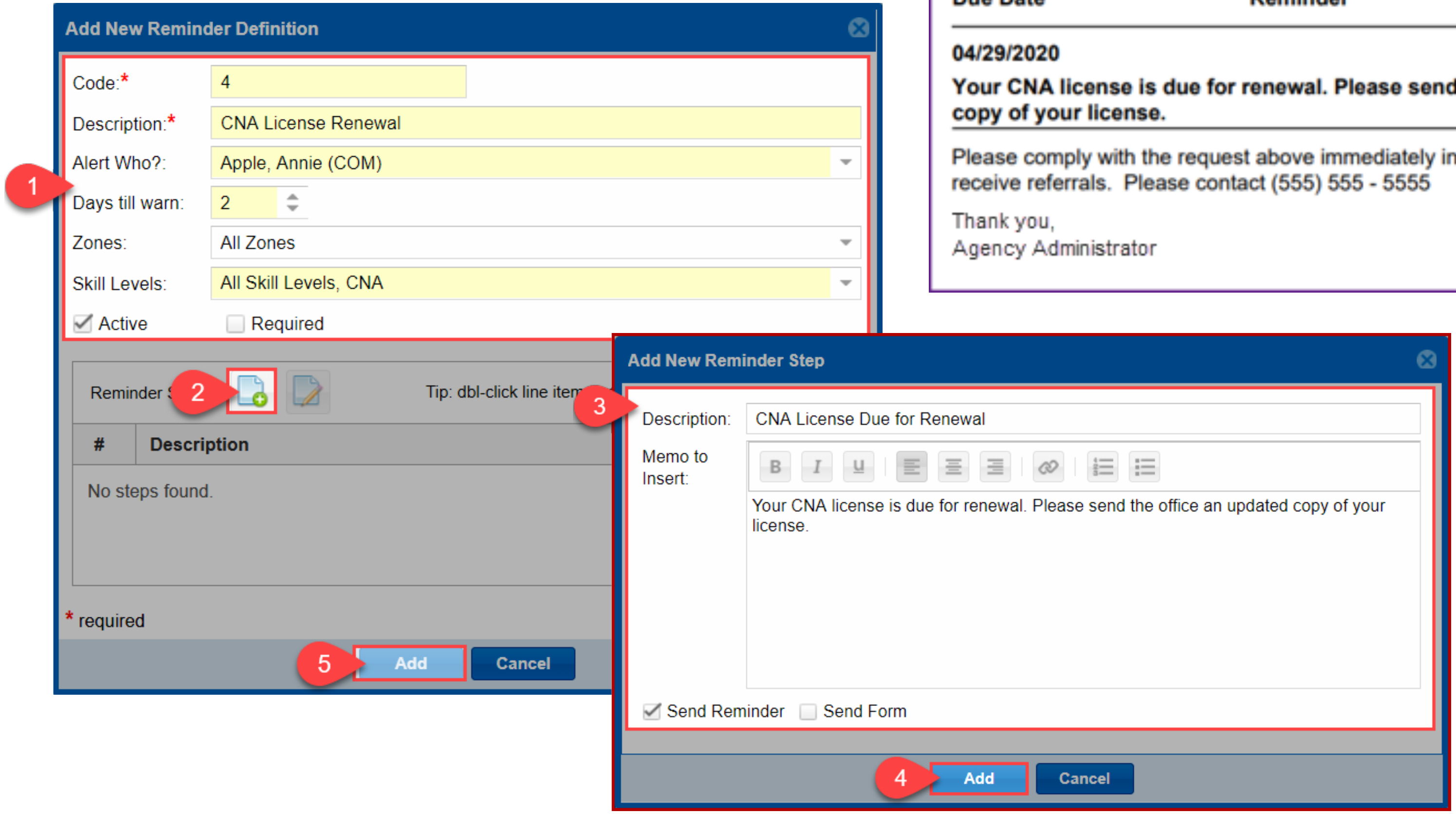
Please comply with the request above immediately in order to continue to receive referrals. Please contact (555) 555 - 5555

Thank you,
Agency Administrator

Creating a caregiver reminder includes adding any necessary steps.

Configuration Notes

- Caregiver reminders can be limited to a particular skill level
- When a reminder is entered on the Reminder tab of the Caregiver record, on the day specified the caregiver will receive the reminder with the opening and closing text defined in Setup and the memo inserted between.



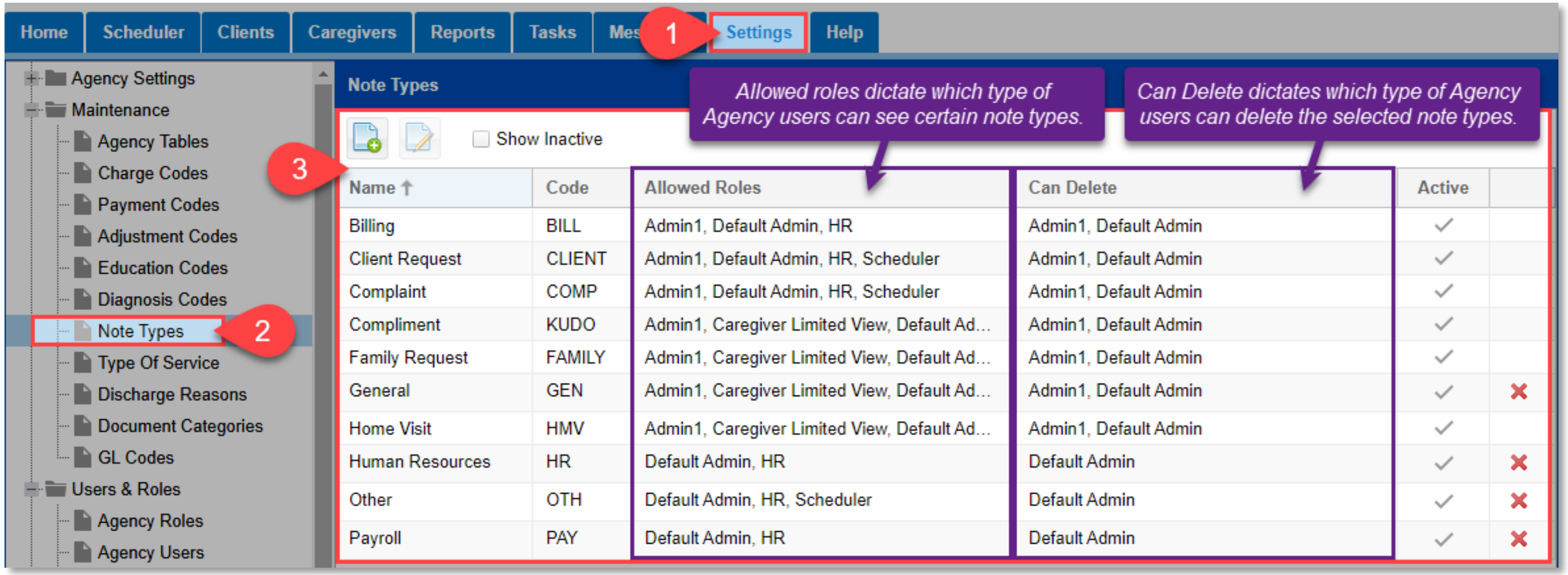
Communication Setup

Note Types

Use the Note Types tab to add and edit customized notes pertaining to Agency needs such as “General”, “Compliment”, “Complaint”, “Prospect”, and “Emergency Preparedness”.

Configuration Notes

- Use the Allowed Roles column to control which Agency Roles can view each note type within CareWhen.



Name	Code	Allowed Roles	Can Delete	Active
Billing	BILL	Admin1, Default Admin, HR	Admin1, Default Admin	✓
Client Request	CLIENT	Admin1, Default Admin, HR, Scheduler	Admin1, Default Admin	✓
Complaint	COMP	Admin1, Default Admin, HR, Scheduler	Admin1, Default Admin	✓
Compliment	KUDO	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓
Family Request	FAMILY	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓
General	GEN	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓
Home Visit	HMV	Admin1, Caregiver Limited View, Default Ad...	Admin1, Default Admin	✓
Human Resources	HR	Default Admin, HR	Default Admin	✓
Other	OTH	Default Admin, HR, Scheduler	Default Admin	✓
Payroll	PAY	Default Admin, HR	Default Admin	✓

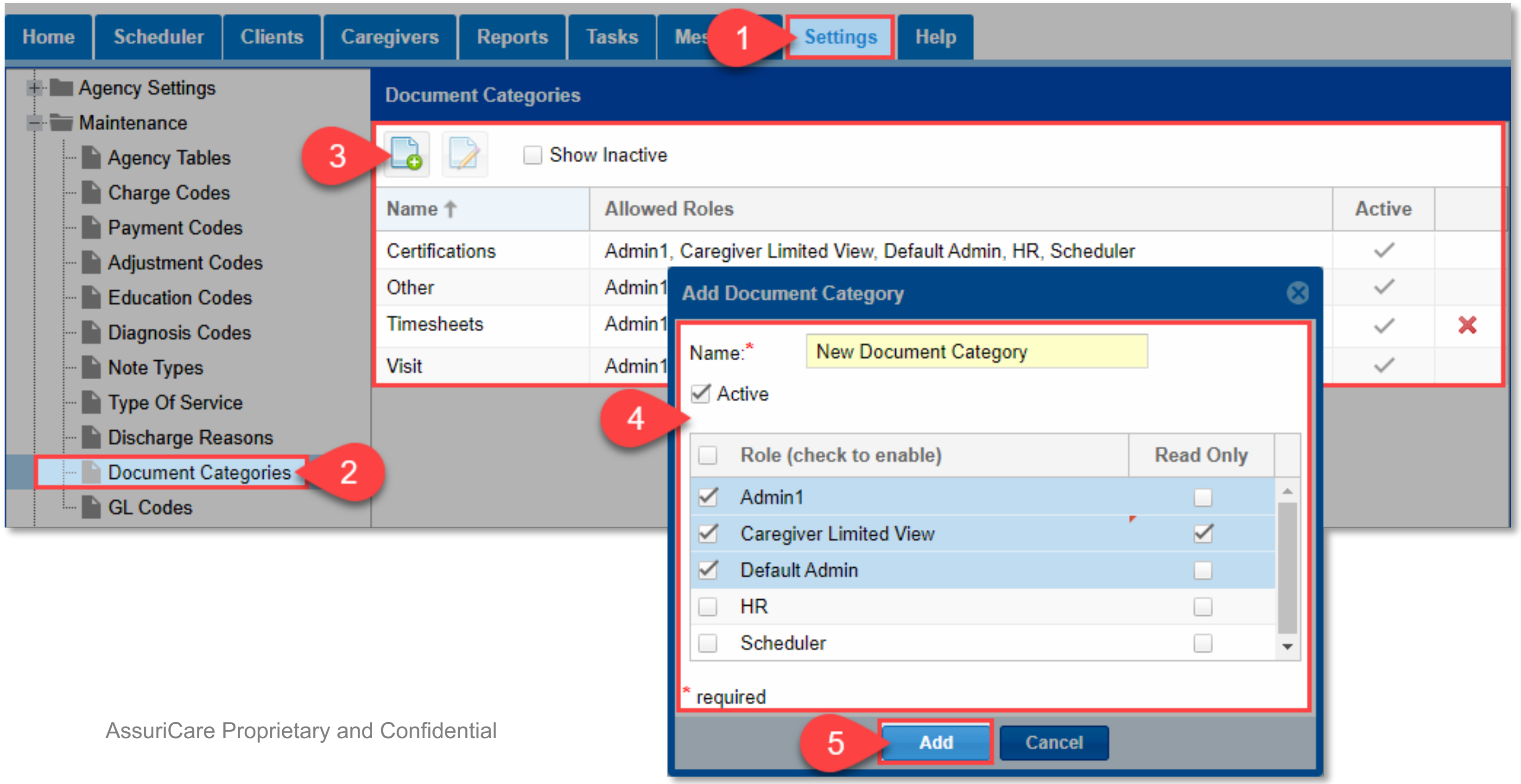
Communication Setup

Document Categories

The Document Categories table is used to maintain a list for classifying documents that are uploaded into the system for either Caregivers or Clients. Categorizing documents makes searching for them easier, and Visit Categories are used for document uploads in the CareWhen Mobile App.

Configuration Notes

- When adding or editing document categories, toggle items in the Role table to select roles that can view each document type.



User Management

User Management allows you to define user roles for your Agency and create and manage new users

Configure user roles and permissions

Add new users

Manage users

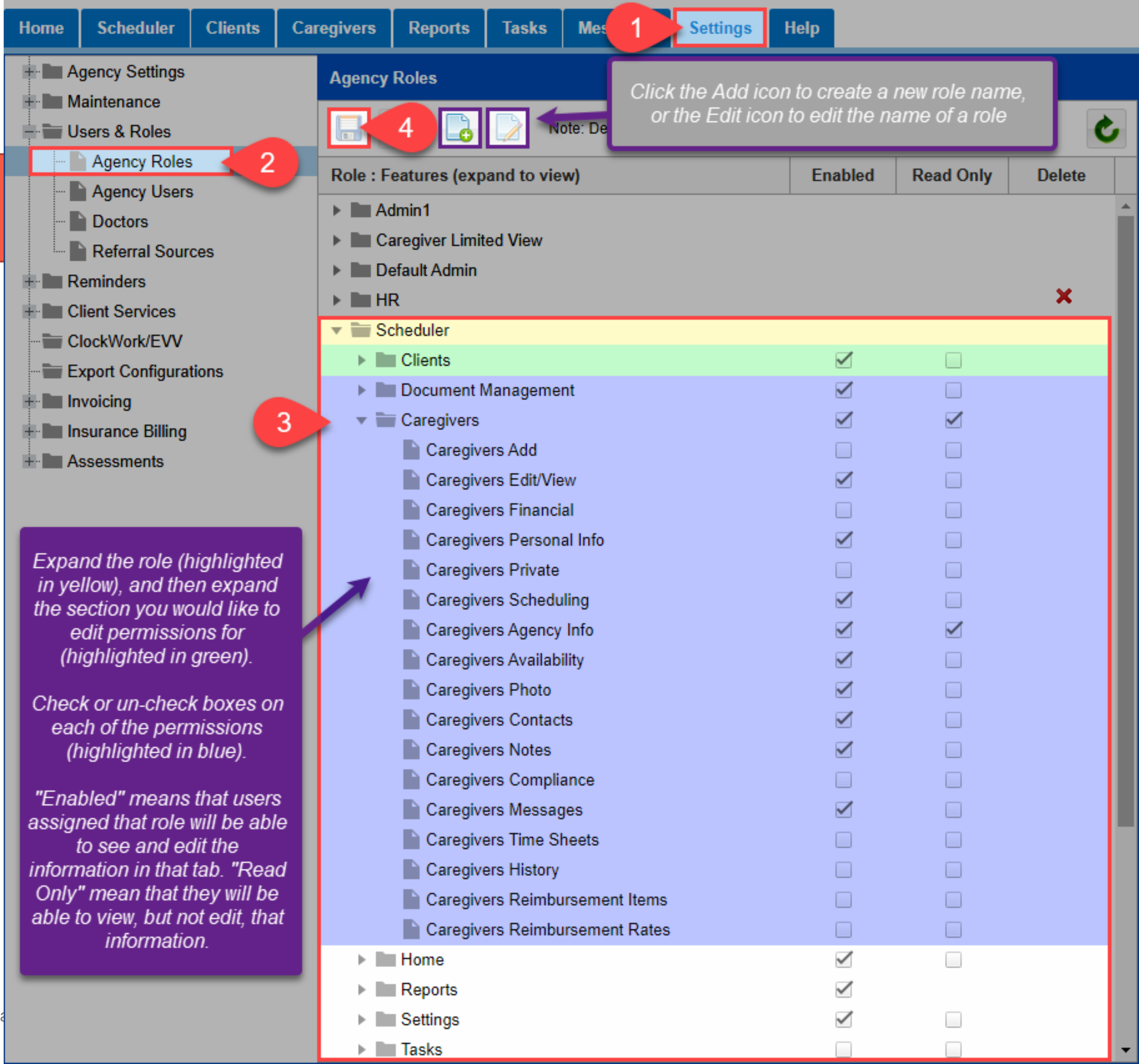
User Management

Roles

Agencies can customize and create user roles to control what users can do within CareWhen. For example, you may not want a scheduler to view or change client billing information.

Configuration Notes

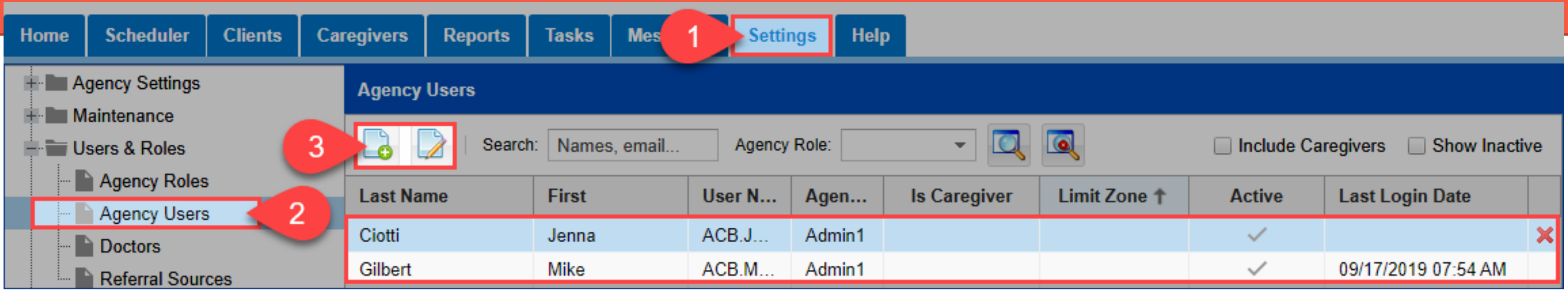
- "Admin1", along with any other Roles that have been assigned to users, may not be removed.
- For users that should have access to everything, assign Admin1.
- If a user is unable to perform a specific action, it is often because the role they are in is not set up to allow it.



User Management

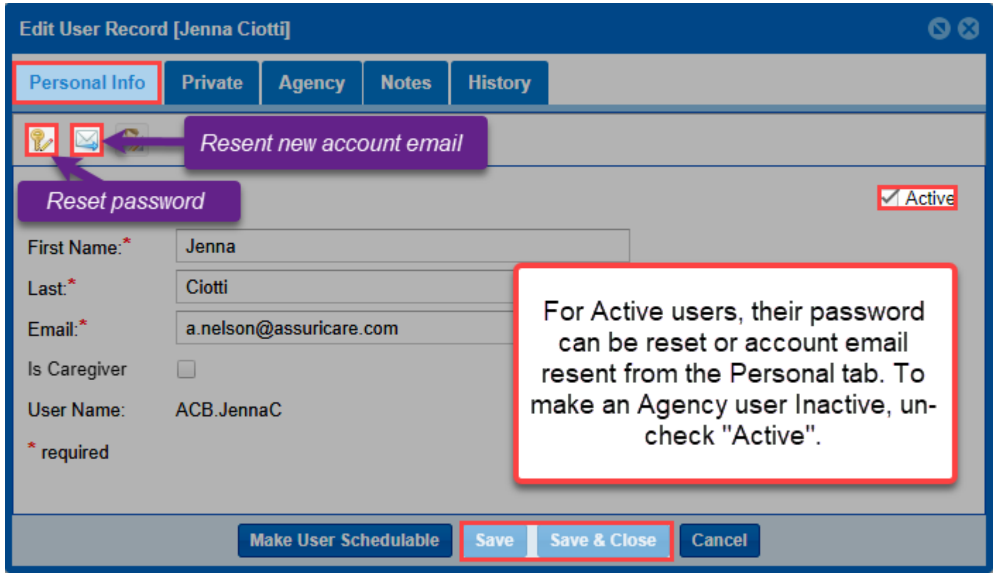
Agency Users

You can add and update your users within the Agency Users tab. Each user will be assigned a role when created.



Configuration Notes

- This tab will show active users by default. Checking Show Inactive will include inactive users, as well. Additionally, Include Caregivers can be toggled on to display Caregivers in this table.
- Agency administrators can also reset passwords or resend account emails from this tab by editing the user.



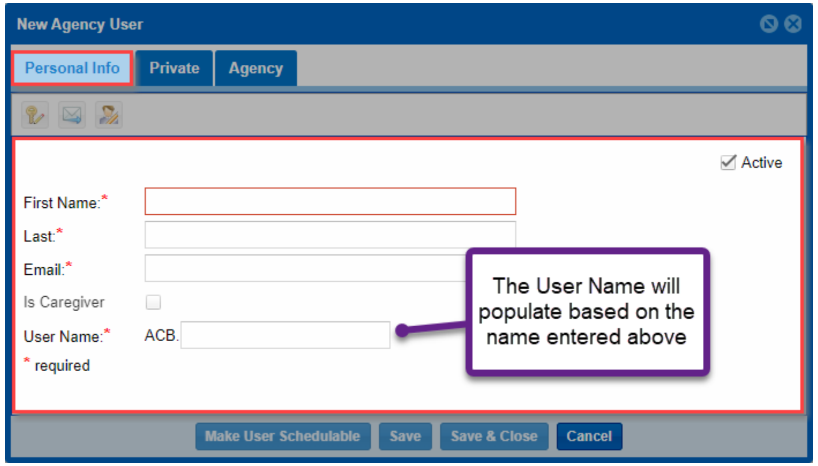
User Management

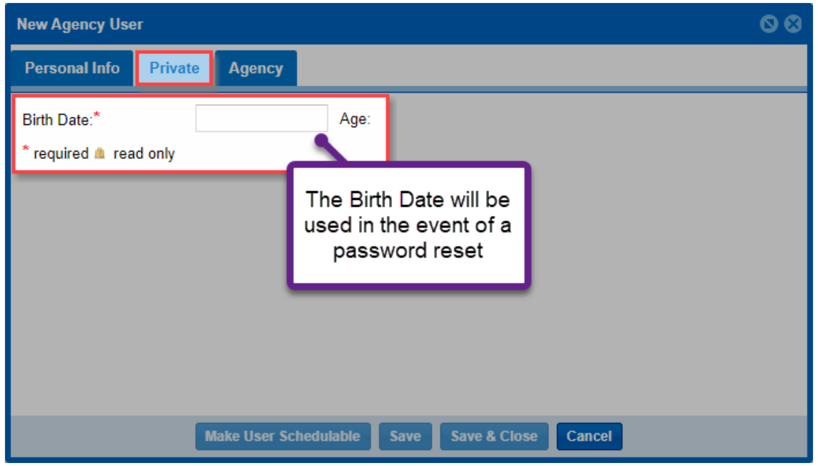
Adding a User

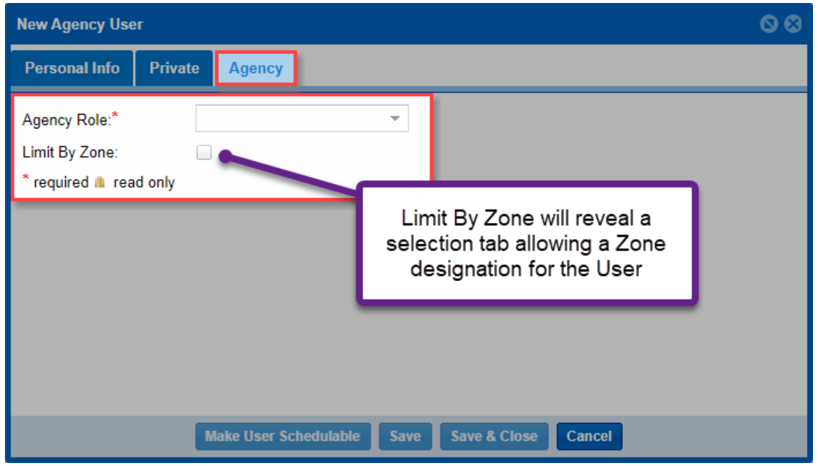
When adding a new user, information such as their name, email, username, birth date, and role are required.

Configuration Notes

- The username will populate automatically based on the name entered.
- Users can be limited to a particular zone if they should only see or edit data relating to clients and caregivers assigned to that zone.







Clockwork / EVV Settings

Configure settings pertaining to visit check-in, time tracking, and alerts

- Set scheduling and visit parameters for Caregivers
- Add clock-in and clock-out prompts
- Manage visit alerts

ClockWork / EVV

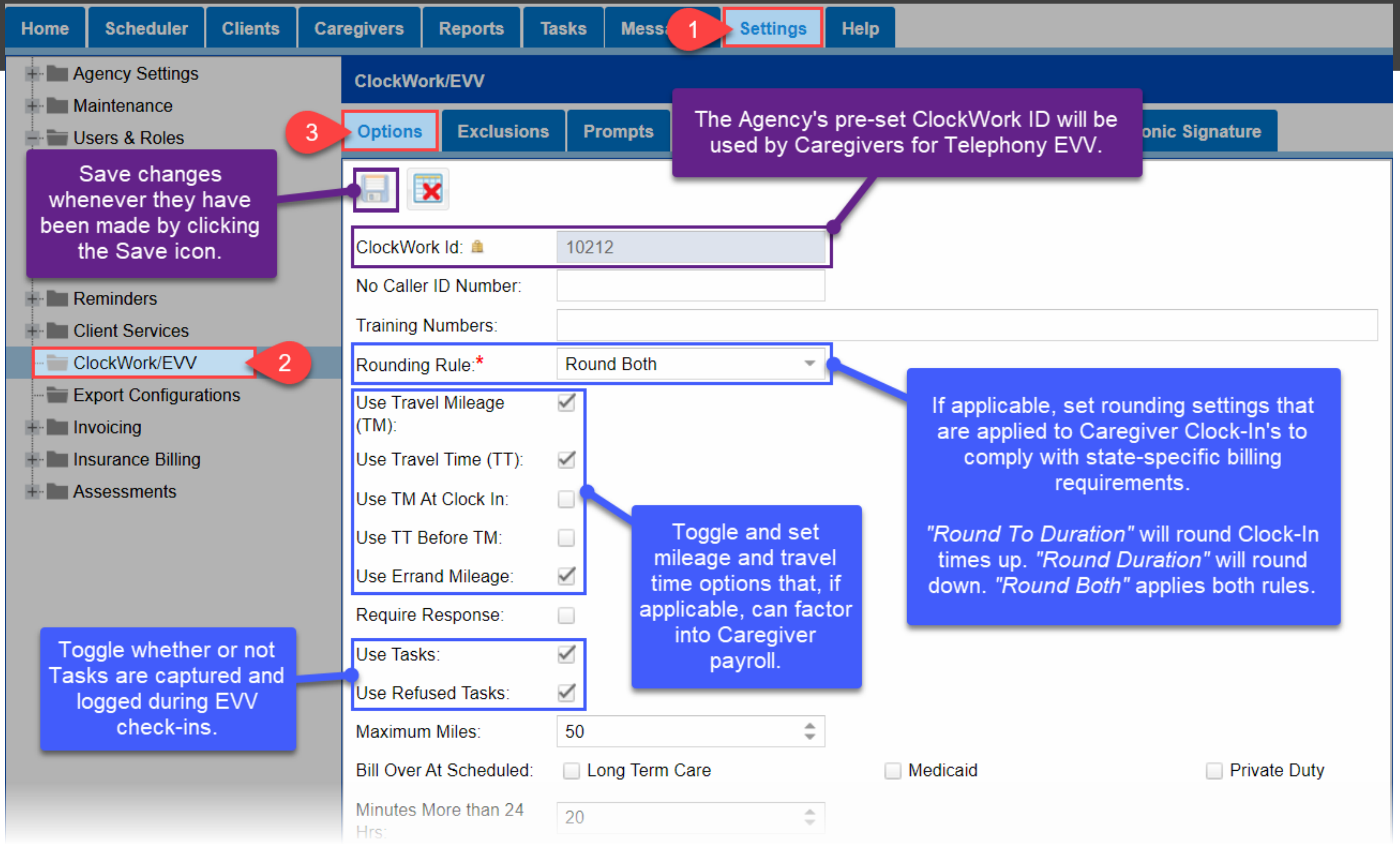
Options

Use the Options tab to configure a multitude of settings used for both CareWhen mobile app and ClockWork telephony-based EVV.

These settings largely determine what is logged by Caregivers upon check-in and check-out. Some examples of what can be controlled are outlined in blue.

More information…

- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.



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ClockWork / EVV

Options Continued

Use the Options tab to configure a multitude of settings used for both CareWhen mobile app and ClockWork telephony-based EVV.

These settings largely determine what is logged by Caregivers upon check-in and check-out. Some examples of what can be controlled are outlined in blue.

More information…

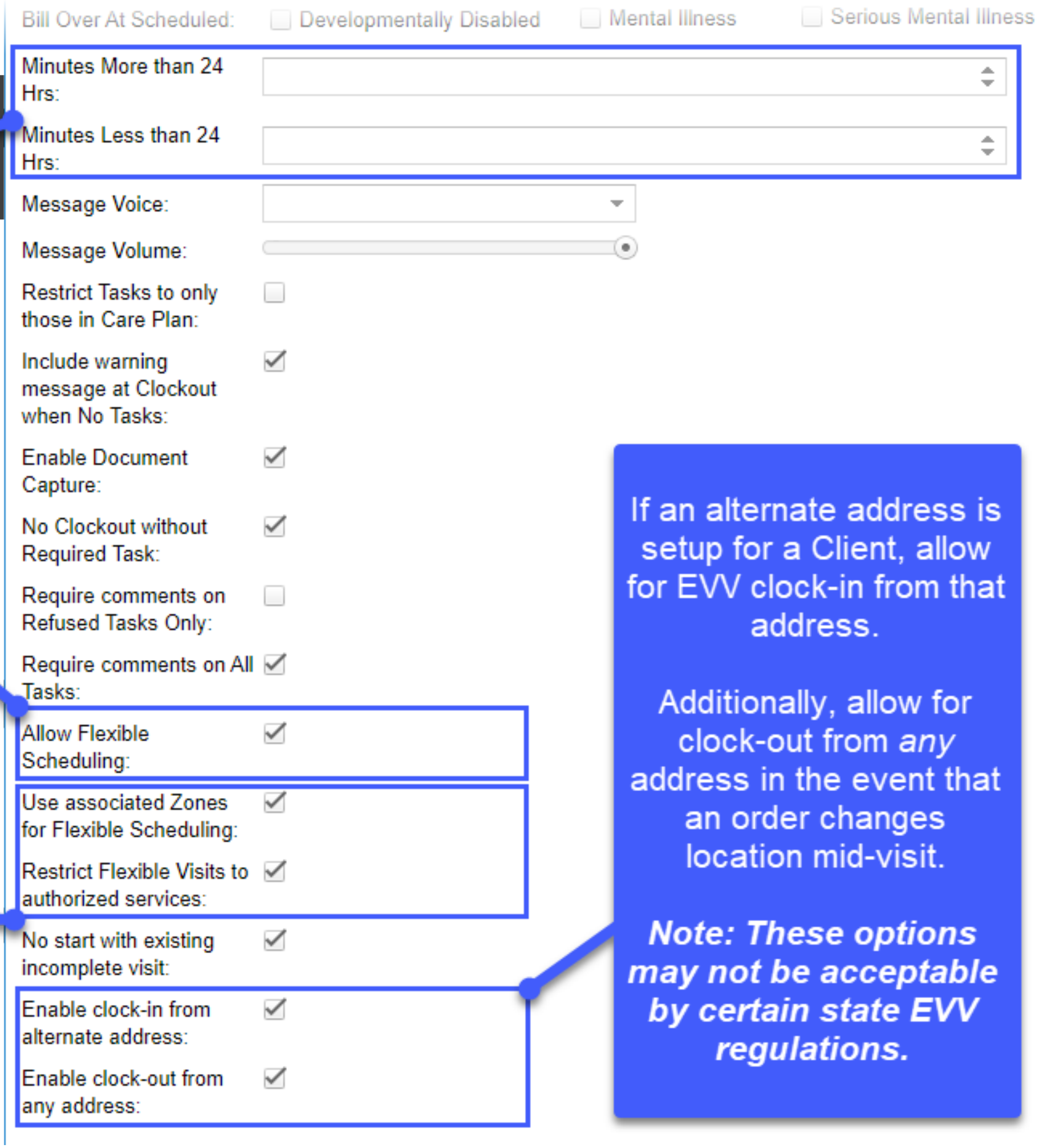
- For a detailed breakdown of these options, reference the ClockWork / EVV section of the CareWhen Product Guide.

Set the window of time at the end of a daily shift that Caregivers will be able to clock-out early or late.

To allow Caregivers to check-in for non-scheduled visits, ensure that Allow Flexible Scheduling has been checked.

Expand Flex visit Client options for Caregivers by including all Clients in Caregivers zone.

Only allow Flex visits for services that a Client is authorized to receive by insurance.



If an alternate address is setup for a Client, allow for EVV clock-in from that address.

Additionally, allow for clock-out from *any* address in the event that an order changes location mid-visit.

Note: These options may not be acceptable by certain state EVV regulations.

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ClockWork / EVV

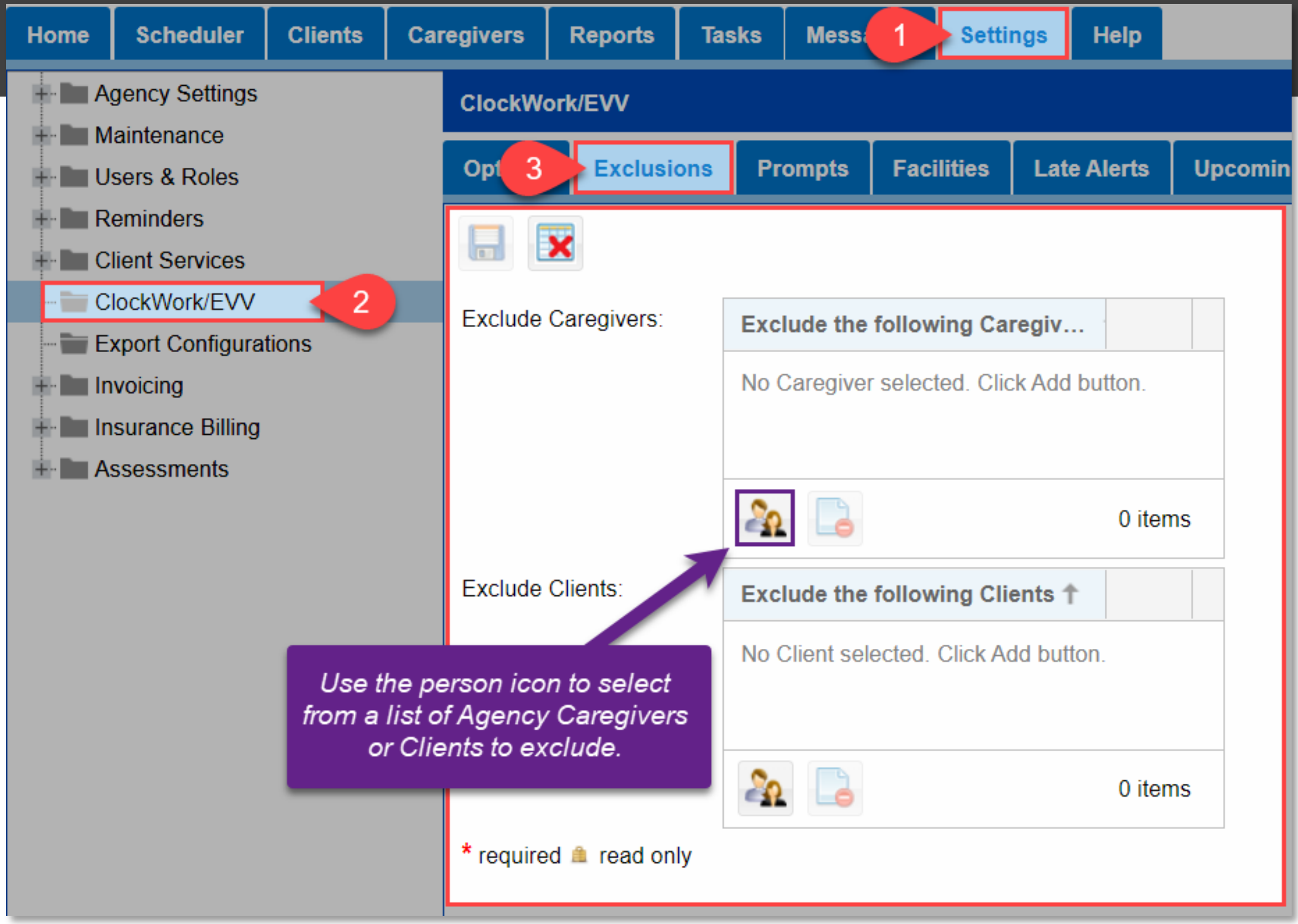
Exclusions

Use the Exclusions tab to omit users from utilizing CareWhen / ClockWork EVV.

These users will remain present in the system but will be unable to check-in or check-out using the mobile app or telephony systems.

For Example…

- If utilizing a placeholder Client such as “Office Meeting” or “Travel Time”



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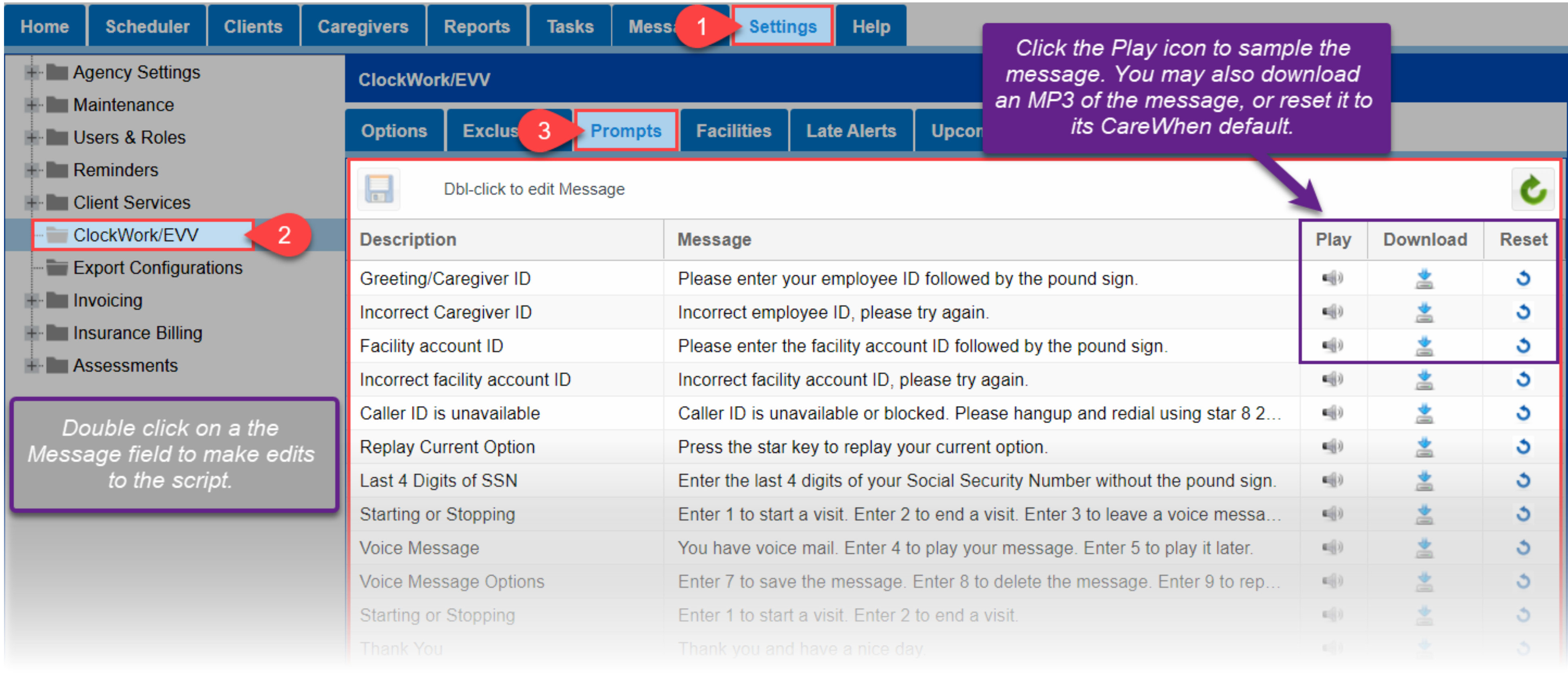
ClockWork / EVV

Prompts

Use the Prompts tab to edit, sample, download, or reset automated voice prompts that Caregivers will respond to when clocking in or out.



Configuration Note

- Consult with AssuriCare before making changes to Prompts

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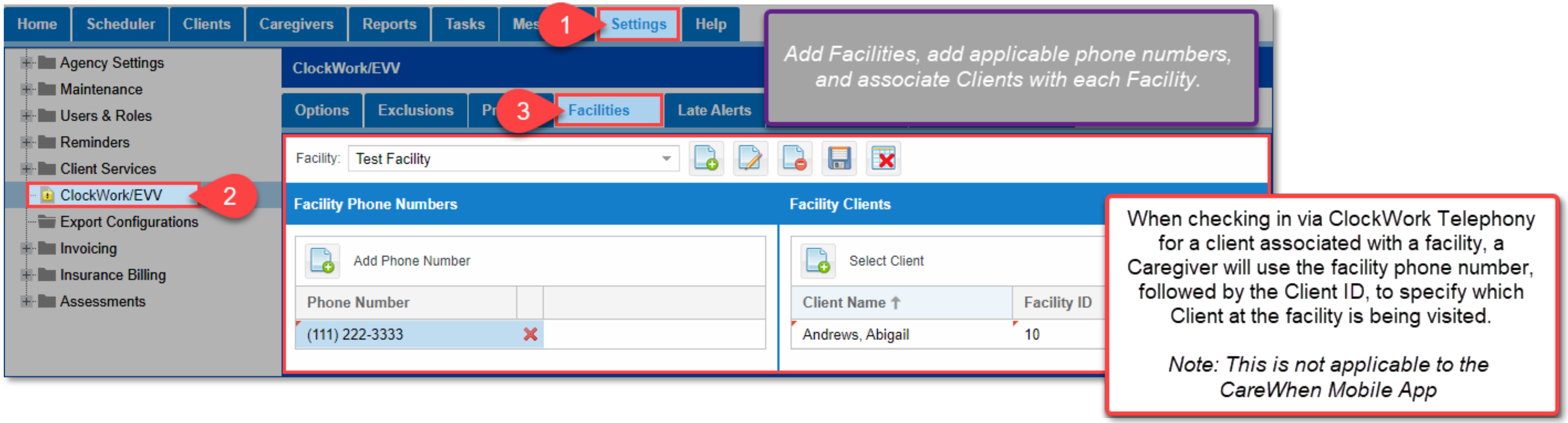
ClockWork / EVV

Facilities

If multiple clients are based in a single care facility and share a single contact number, or if multiple clients are based in a single residence, use the Facilities tab to organize the applicable clients under a common Facility and phone number.



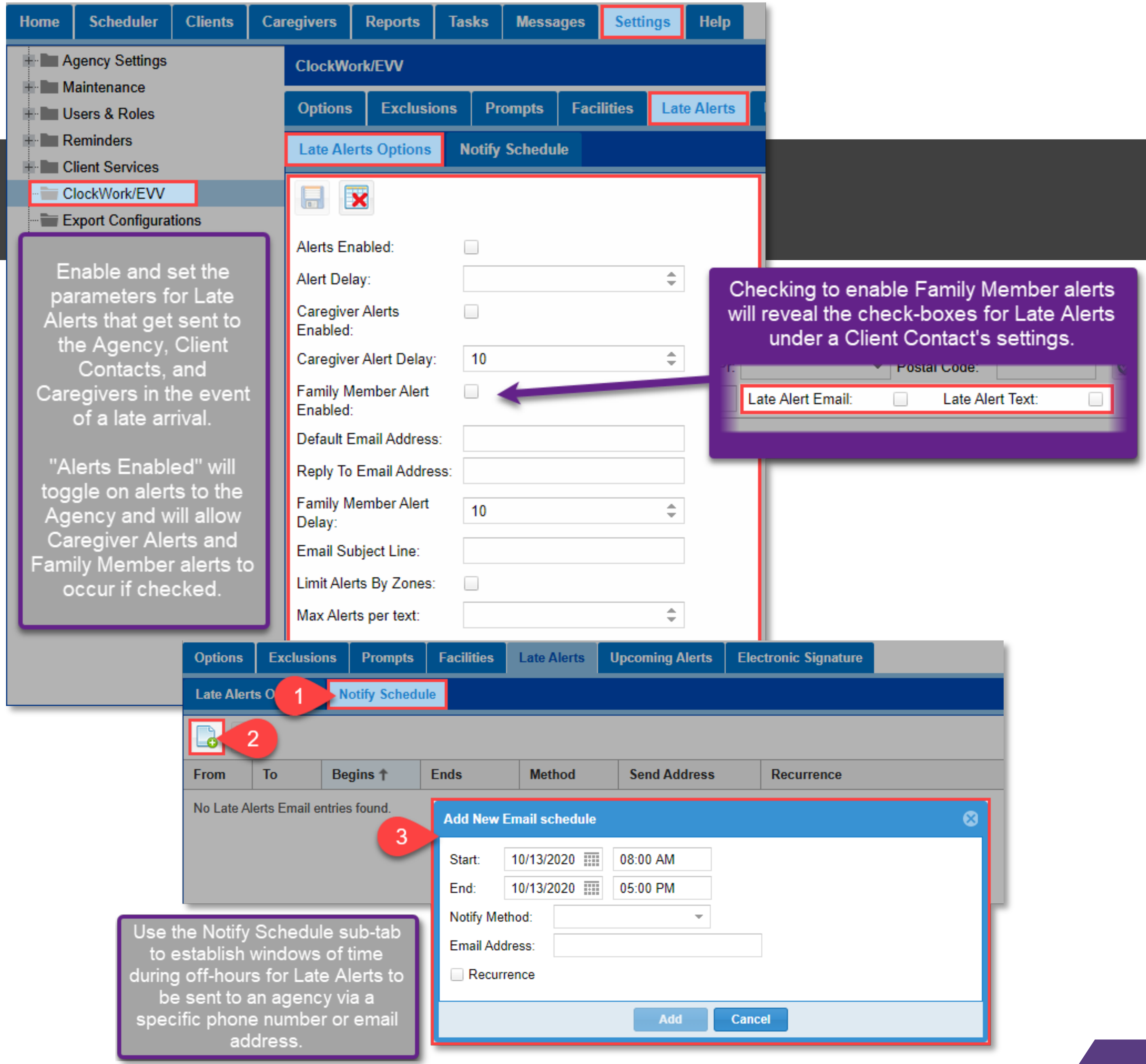
ClockWork / EVV

Late Alerts

The Late Alerts tab can be used to configure alerts that are sent out to Client Contacts in the event of a late Caregiver arrival. Additionally, Caregiver late alerts can be toggled to notify the Caregiver of a late start time.

Configuration Note

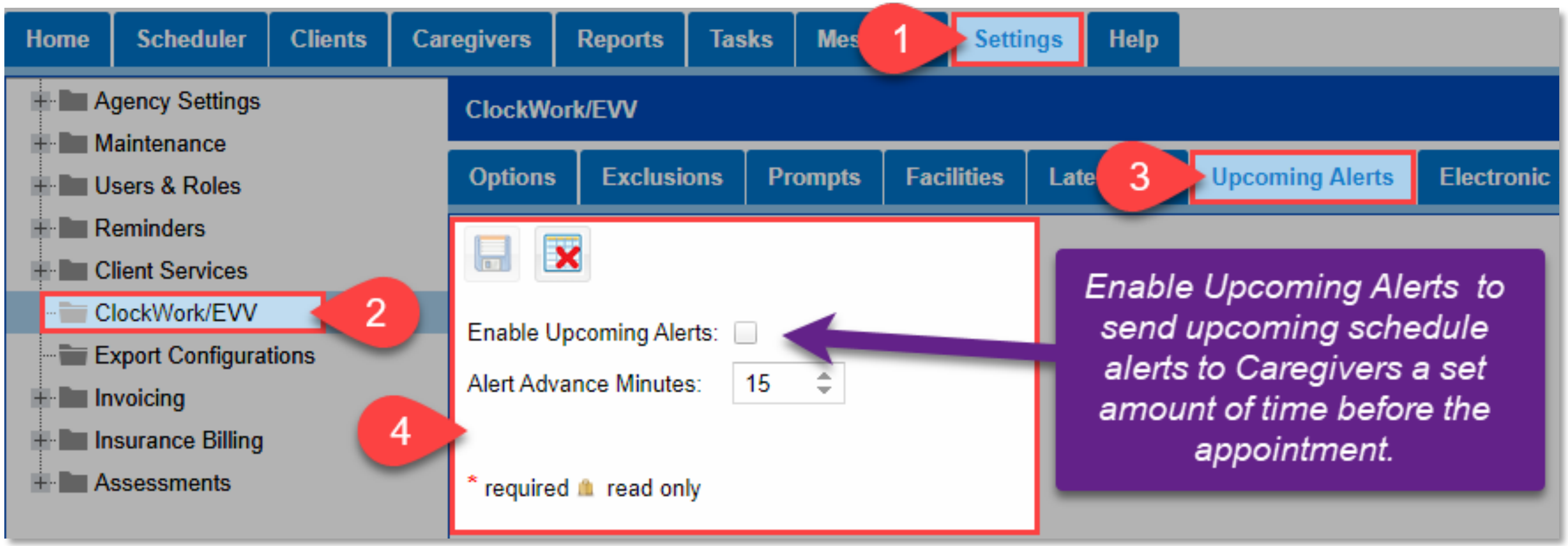
- For late alerts to sent out via email, Client Contacts or Caregivers must have email addresses on file.
- Clients or Caregivers “Excluded” from EVV will not receive late alerts.



ClockWork / EVV

Upcoming Alerts

Use the Upcoming Alerts tab to enable Caregiver alerts that are sent out as a reminder before a visit's scheduled start time. The amount of time before a visit that the alert is sent out can be altered.



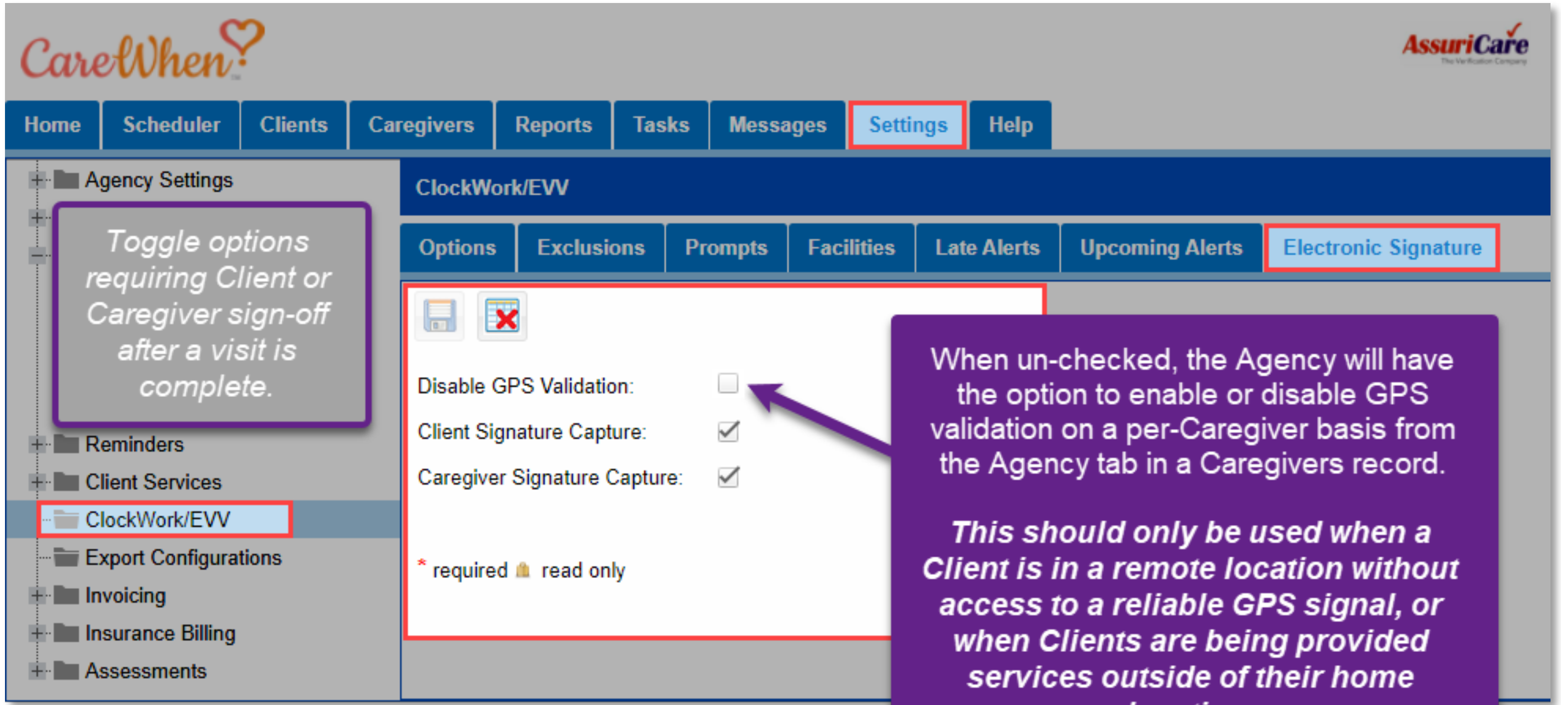
ClockWork / EVV

Electronic Signature

Electronic Signatures used for sign-off following a visit can be toggled from the Electronic Signature tab. Additionally, use this tab to toggle the GPS Validation setting to allow for enabling or disabling GPS validation on a per-Caregiver basis.

Configuration Note

- GPS Validation requires that both Signature Capture options be turned on



When un-checked, the Agency will have the option to enable or disable GPS validation on a per-Caregiver basis from the Agency tab in a Caregivers record.

This should only be used when a Client is in a remote location without access to a reliable GPS signal, or when Clients are being provided services outside of their home location.

Note: If GPS Validation is enabled, Signature Capture must also be enabled.

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